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# Business Solutions

## User Manual xRM1 HR Management

English



## Table of Contents

<b>0 Before you start</b>	<b>4</b>
0.1 Foreword	4
0.2 System requirements	4
<b>1 Terminology</b>	<b>5</b>
1.1 Costs	5
1.2 Full Time Equivalent	5
1.3 Business Closure	5
1.4 Absence	5
1.5 Public Holiday	5
1.6 New Annual Leave	5
1.7 Remaining days of leave (expired)	5
<b>2 System administration settings</b>	<b>6</b>
2.1 Absence Administration	6
2.1.1 Business Closure	6
2.1.2 Absence	6
2.1.3 Sick leave	6
2.1.4 Public holidays	6
2.1.5 New annual holiday	6
2.1.6 Remaining days of vacation (expired)	6
2.2 „Bing Maps“ Integration	6
<b>3 Using xRM1 HR Management via Microsoft Outlook</b>	<b>8</b>
<b>4 xRM1 HR Management Functions</b>	<b>10</b>
4.1 Employee Recruiting	10
4.1.1 Job Profiles	10
4.1.2 Open Placements	12
4.1.3 Recruiting Channels	15
4.1.4 Applications	16
4.1.5 Applicants	19
4.2 Employee Organization	21
4.2.1 Onboarding/Offboarding	21
4.2.2 Employees	26
4.2.3 Employment Contracts	28
4.2.4 Wages	29
4.2.5 Absence Administration	31
4.2.6 Absence Calendar	32
4.2.7 Disciplinary Measures	34
4.2.8 Processes	35
4.2.9 Process Resources	38
4.2.10 Departments	39
4.2.11 Facilities/Equipment	41
4.3 Employee Development	43
4.3.1 Job History	43
4.3.2 Education	44
4.3.3 Certificates	45
4.3.4 Skills	47
4.3.5 Skill Levels	48
4.3.6 Performance Reviews	49
4.3.7 Review Details	50
4.3.8 Medical Records	52
4.4 Employee Services	53
4.4.1 Absences	53
4.4.2 Travels	55
4.4.3 Receipts	57
4.4.4 Employee Cockpit	58
4.4.5 Fast Time Entry	59
<b>5 Time entry functionalities</b>	<b>60</b>
5.1 Fast Time Entry	60
5.2 Entering Time with the Employee Cockpit mask	61
5.2.1 Time Entry with the "New" button	62
5.2.2 Time Entry with the stopwatch	62
5.2.3 Time Entry with the calendar view	62
5.2.4 Graphical hours overview	63
5.2.5 Navigation, views and filters	63
5.2.6 Employee Cockpit Mask modification	63
<b>6 My Work – HR Management Controlling</b>	<b>68</b>
6.1 Dashboards	68
6.1.1 HR Management Executive Dashboard	68
6.1.2 HR Management Recruiting Dashboard	69
6.1.3 HR Management Organization Dashboard	70
6.1.4 HR Management Development Dashboard	71
6.1.5 HR Management Employee Services Dashboard	72
6.2 Activities	72
6.3 Human Resource Report	74
<b>7 Rights and roles concept</b>	<b>76</b>
7.1 Default settings	76



7.1.1	Licensing	76
7.1.2	Global	77
7.2	Installation	77
7.3	Solution activation (Activation Wizard)	77
7.3.1	Activating a free trial	78
7.3.2	Activating temporary or purchased license(s)	80
7.4	Solution configuration (Configuration Wizard)	81
7.5	License management	83
7.6	Roles concept	83
7.7	xRM1 HR Management security roles	84
7.7.1	xRM1 HR Employee	84
7.7.2	xRM1 HR Supervisor	84
7.7.3	xRM1 HR Manager	84
7.8	License types and license assignment	84

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## 0 Before you start

### 0.1 Foreword

**"xRM1 HR Management"** is the Business Solution for recruiting, managing and developing company employees, including Employee Services, in Microsoft Dynamics.

It includes functions for Candidate Management, Onboarding, Organizational Charts, Absence Management, Skill and Performance Management, as well as Scorecards. Employee Services for Time Entry, Request for Leave and Expenses & Travel Management are also included.

We recommend that the reader of this manual has basic knowledge of project management and is proficient in working with Microsoft Dynamics.

If you don't meet these requirements, we recommend that you familiarize yourself with these topics beforehand, as this will help you work more efficiently and sensibly with **"xRM1 HR Management"**.

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**Note:** *"xRM1 HR Management" is built upon all Microsoft standards, particularly in regards to forms, views and rights and roles. Should you find that information, elements or functions are not as they appear in the document, please ensure that the user you are using has the required rights and that the required basic settings are in the system.*

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As many HR executives use Microsoft Outlook in order to manage their staff and the several HR functions, the description of the functions in this manual is based on Microsoft Outlook wherever applicable.

### 0.2 System requirements

In order to use **"xRM1 HR Management"**, several system requirements must be in place. They can be found in the "Getting started guide" on our website <http://www.xRM1.com>.



## 1 Terminology

The following selected terms are found within „**xRM1 HR Management**". Here you will find them defined in more depth, for further clarification.

### 1.1 Costs

Costs define the monetary expenditure the project creates within your organization. These are only internal costs, in different forms (from personnel-related expenditure, material usage, travel, etc.)

### 1.2 Full Time Equivalent

A full time equivalent, sometimes abbreviated as FTE, is a unit to measure employed people in a way that makes them comparable although they may work a different number of hours per week.

The unit is obtained by comparing an employee's average number of hours worked to the average number of hours of a full time worker.

A full time person is therefore counted as one FTE, while a part-time worker gets a score in proportion to the hours he or she works. For example, a part-time worker employed for 20 hours a week where full time work consists of 40 hours, is counted as 0.5 FTE.

### 1.3 Business Closure

The business closure defines the days in which vacation is mandatory for the whole company. Thus, an employee's remaining days of leave are reduced automatically for business closure days. Business Closures are standardized for all employees.

### 1.4 Absence

Absence includes all types of vacation/leave with remaining days of leave.

### 1.5 Public Holiday

Public holidays can be standardized for all employees. Here, leave is not subtracted.

### 1.6 New Annual Leave

New annual leave for the upcoming year can be entered individually for each employee.

### 1.7 Remaining days of leave (expired)

If an employee has not taken all of his/her allotted vacation by the end of a business year, the company can decide that remaining days of leave will expire.



## 2 System administration settings

### 2.1 Absence Administration

In the main **"Settings"** menu, the **"Extensions"** section displays a function **"Absence Administration"** which is specific to **"xRM1 HR Management"**.

**"Absence Administration"** is an extension of **"Requests for Leave"** and completes the employee absence administration process. Illness, public holidays and business closures can all be managed centrally here by the HR department. The role **"xRM1 HR Manager"** is required for access to this area.

#### 2.1.1 Business Closure

The **"Business Closure"** status allows business closures to be created. For all users, the relevant number of vacation days is subtracted from the remaining holiday, and a business closure is generated in the work time calendar of Microsoft Dynamics.

#### 2.1.2 Absence

**"Absence"** is used to flag an employee as "not available" for a certain period of time, due to illness or other reasons. The number of remaining vacation days for this employee is not changed.

#### 2.1.3 Sick leave

**"Sick leave"** is a special characteristic of an absence. An employee's absence caused by sickness or illness is entered here. The functionality of a **"Sick leave"** is equal to an **"Absence"**.

#### 2.1.4 Public holidays

Selecting **"Public holiday"** adds an absence for all relevant employees for the date selected. Unlike selecting business closure, there is no change to the number of remaining vacation days.

#### 2.1.5 New annual holiday

**"New annual holiday"** is available to enter new annual holiday for all employees. The system takes the **"Annual holiday"** value for every employee, stores it for every user in the user entity, and adds any available holiday remaining.

#### 2.1.6 Remaining days of vacation (expired)

**"Remaining days of vacation (expired)"** is used for every employee individually, to deduct unused vacation from the vacation days allotted. This process must be done by the HR department for every employee. The function automatically reduces the remaining vacation days for that user.

### 2.2 „Bing Maps“ Integration

In order to use **"Bing Maps"** integrations (e.g. in the **"Employee"** or **"Applicant"** form), please assure that **"Enable Bing Maps"** is set to **"Yes"** under **"Settings"** --> **"Administration"** --> **"System settings"** --> **Tab „General“**.



# System Settings



Set system-level settings for Microsoft Dynamics CRM.

General Calendar Formats Auditing Email Marketing Customization Outlook Reporting Goals

## Select the default save option for forms

Enable auto save on all forms

☒ Yes ☐ No

## Set the IM presence option

Enable presence for the system

☒ Yes ☐ No

## Set the full-name format

Name Format

First Name Last Name

## Set the currency precision that is used for pricing throughout the system

Pricing Decimal Precision

2

## Set whether reassigned records are shared with the original owner

Share reassigned records with original owner

☐ Yes ☒ No

## Set blocked file extensions for attachments

ade;adp;app;asa;ashx;asmx;asp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpl;crf;csf;dll;exe;fpx;hlp;hta;httr;htw;ida;idc;idq;inf;ins;isp;its;js;se;ksh;lnk;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;mst;ops;pcd;pif;prf;prg;printer;pst;reg;rem;scf;scr;sct;shb;shs;shtm;shtml;soap;stm;tmp;url;vbe;vbs;vsmacros;vss;vst;vsw;ws;wsc;wsf;wsh

## Set the currency display option

Display currencies by using

Currency symbol

## Set up Quick Find

Enable Quick Find record limits

☒ Yes ☐ No

Select entities for search on CRM for tablets

Select...

## Enable Bing Maps

Show Bing Maps on forms

☒ Yes ☐ No

Please enter Bing Maps key

## Set the default country/region code

☒ Enable country/region code prefixing

Country/Region Code Prefix +1

## Set the telephony provider

Select provider for Click to call

☒ Skype ☐ Lync

## Set whether users see CRM for tablets message

Users see app download message

☒ Yes ☐ No

OK

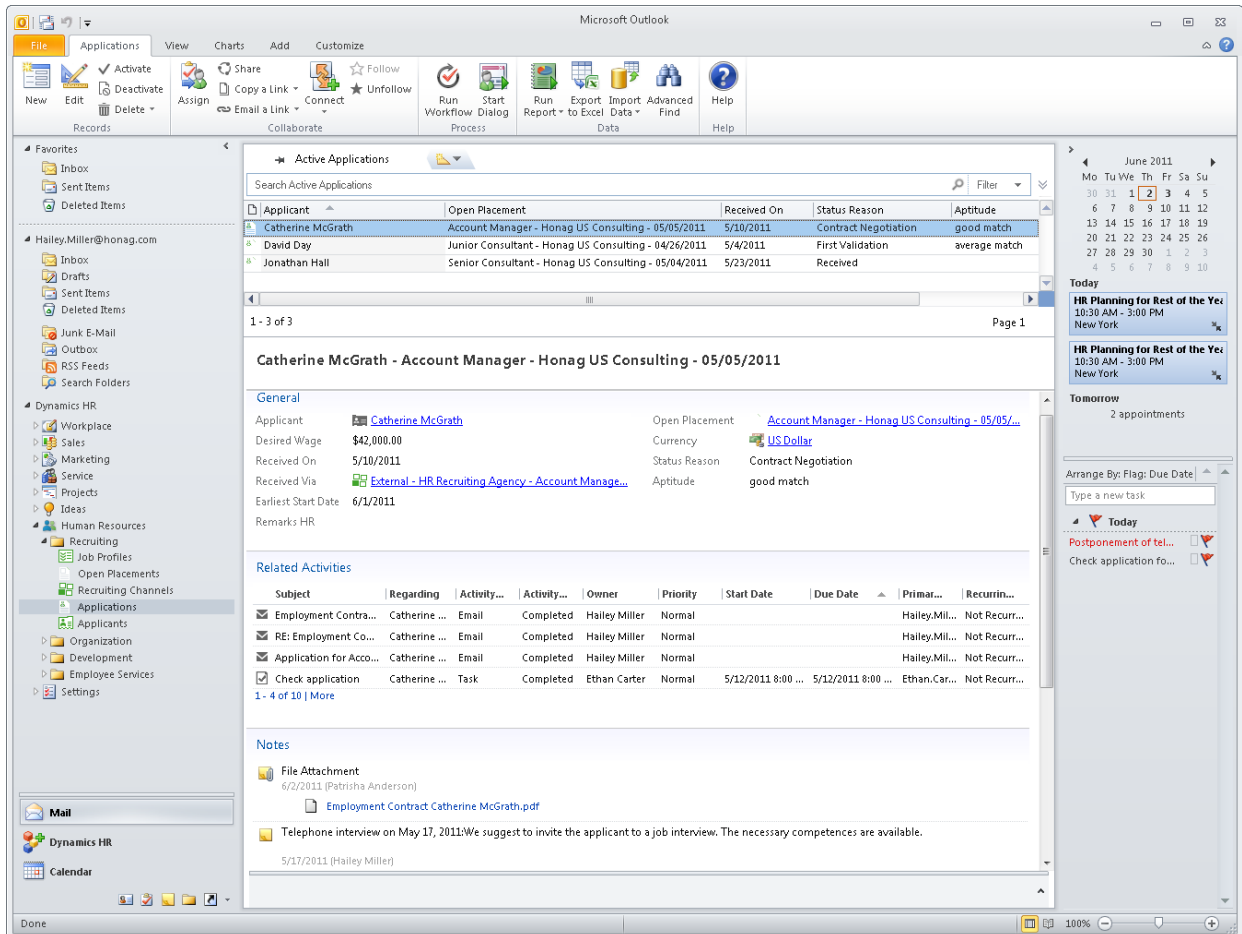
Cancel



### 3 Using xRM1 HR Management via Microsoft Outlook

Many HR managers prefer using Microsoft Outlook to organize and develop the staff they are responsible for. Therefore, the usage of the **"xRM1 HR Management"** functions will be described from a Microsoft Outlook point of view.

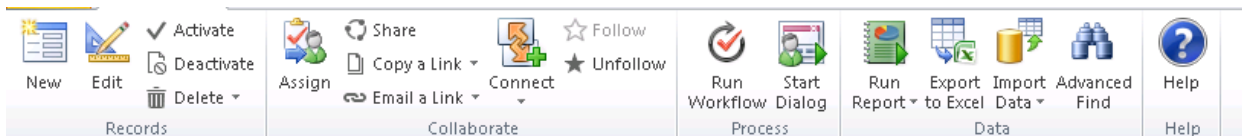
In order to use a function in Outlook, click on the desired function on the right hand site. The start screen of the function shows a respective view and a preview of the selected record.



The displayed sections of the record can be moved by drag and drop.

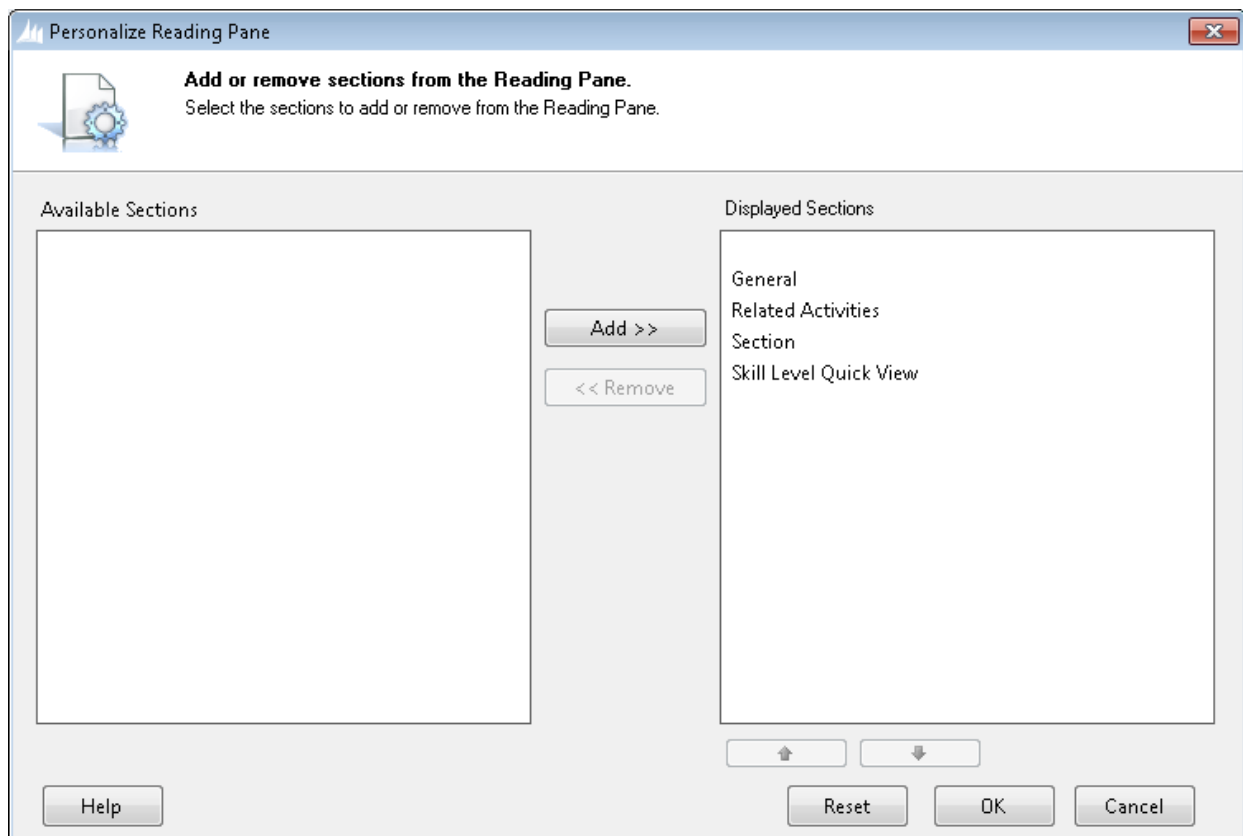
The layout can be changed by clicking on **"View"** and then on the respective button in the **"Layout section"**, e.g. **"Navigation Pane"**.

As known from Microsoft Dynamics, the user may create new records and edit, activate, deactivate, delete, assign or share it. Other functionalities from Microsoft Dynamics such as running workflows or reports may be used as well in Outlook.

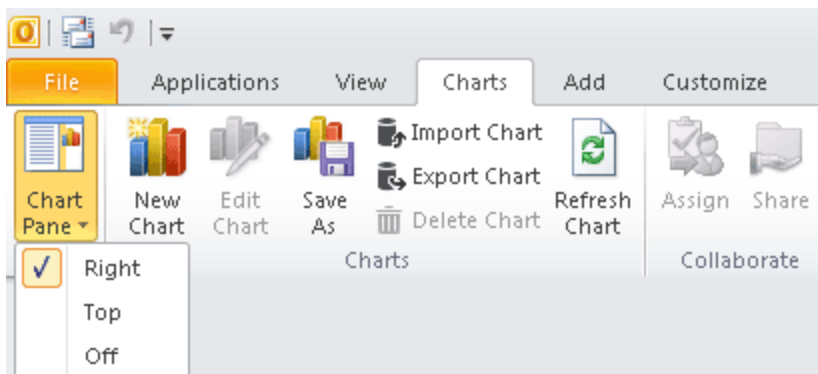


The preview of each function can be easily adapted by clicking on **"View"** and the **"Customize reading pane"**. Here, you can select the displayed sections.





A chart pane can be added by clicking on **"Charts"** and then on **"Chart Pane"**. Here the chart corresponding to the selected view is displayed.



In Microsoft Outlook, you can also decide which view is displayed for which function. Views can be tabbed easily.

1. Open the desired view in a tab by clicking the tab to the right of the active tab, and select the view.
2. Click the push pin and it will turn vertical.
3. The new view is now "pinned".



## 4 xRM1 HR Management Functions

The xRM1 HR Management functions are classified under the following categories:

- **"Recruiting"**
- **"Organization"**
- **"Development"**
- **"Employee Services"**

These categories will be explained in more detail in the upcoming chapters. You will find a detailed description of every field important to a respective function.

Typically, the **"Recruiting"**, **"Organization"** and **"Development"** sections are used by HR managers or HR supervisors. The **"Employee Services"**, on the other hand, can be used by every staff member.

### 4.1 Employee Recruiting

In the **"Recruiting"** section, all applications can be filed, filtered and sorted according to individual requirements. Submit open job requirements, which may be based on specific job profiles, and match applications to open placements. Links to vacancies can be published internally, or to external job markets.

Create standardized job profiles with requirements which can be matched to applicant profiles.

Add applicants and organize them with the standard Microsoft Dynamics **"Contact"** form. **"xRM1 HR Management"** is fully integrated; thus, all other Microsoft Dynamics functionalities are accessible and every applicant can easily be converted to an employee, once the application process is complete. You can see the relation between candidates and their various applications.

#### 4.1.1 Job Profiles

The screenshot displays the Microsoft Dynamics HR Job Profiles interface. The left sidebar shows the navigation pane with 'Job Profiles' selected under 'Recruiting'. The main area is divided into two sections: 'Active Job Profiles' and 'Job Profiles by Level'.

**Active Job Profiles Table:**

Name	Business Unit	Job Level
Account Manager	Honag US Consulting	Team Lead
Junior Consultant	Honag US Consulting	Entry Level
Project Manager	Honag US Consulting	Team Lead
Senior Consultant	Honag US Consulting	Team Lead

**Job Profiles by Level Pie Chart:**

The pie chart shows the distribution of job profiles by level. The legend indicates that the blue slice represents 'Entry Level' (1) and the red slice represents 'Team Lead' (3).

**Account Manager Detail View:**

**General**

Name	Account Manager	Business Unit	Honag US Consulting
Job Level	Team Lead	Work Hours per Week	45.00
Status Reason	In use		
Description	Manager for all accounts in his area		

As default chart, **"Job Profiles by level"** is displayed in the Outlook start screen of this entity. A pie chart shows how many job profiles call a certain level.



#### 4.1.1.1 Main form

HUMAN RESOURCES

Job Profiles

Account Manager

Hailey Miller  
Honag

JOB PROFILE : INFORMATION

Account Manager

General

Name

Account Manager

Business Unit

Honag US Consulting

Job Level

Team Lead

Work Hours per Week

45.00

Status Reason

In use

Description

Manager for all accounts in his area

Skill Levels

Skill	Type (Skill)	Employee	Job Profile	Required
English	Language Skill		Account Manager	4
Sales	Professional Skill		Account Manager	5

StatusActive

**"Name":** Here, you give the job profile a name.

**"Business Unit":** The respective business unit or department can be chosen here.

**"Job Level":** The user can select a certain job level for this position. Here, he/she can choose between

- **"Entry Level",**
- **"Team Lead"**
- **"Management"** and
- **"Upper Management".**

**"Work Hours per Week":** The amount of hours per week for this position is entered here.

**"Status Reason":** The user can decide if the job profile is a

- **"Draft"** or
- **"In use".**

**"Description":** The user can describe the job profile in more detail here.

**"Skill Levels":** In this sub-grid, you will find the skill levels corresponding to this job profile.

**"Open Placements":** In this sub-grid, corresponding open placements can be found.

#### 4.1.1.2 Form "Skill Level"

As **"Skill Level"** is a separate entity, please see chapter 4.3.5 for details.

#### 4.1.1.3 Form "Open Placement"

As **"Open Placement"** is a separate entity, please see chapter 4.1.2 for details.



## 4.1.2 Open Placements

The screenshot displays the Dynamics HR 'Open Placements' entity. The left sidebar shows the navigation pane with 'Open Placements' selected under 'Recruiting'. The top ribbon includes tabs for 'File', 'Open Placements', 'View', 'Charts', 'Add', and 'Customize'. The 'Open Placements' tab is active, showing a list of active open placements and a bar chart.

**Active Open Placements**

Job Profile	Quantity	Business Unit
Senior Consultant	1	Honag US Consulting
Junior Consultant	2	Honag US Consulting
Account Manager	1	Honag US Consulting

**Open Placements by Business Unit**

Business Unit	Sum (Quantity)
Honag US Consulting	4

**Senior Consultant - Honag US Consulting - 05/04/2011**

**Details**

Job Profile	Senior Consultant	Quantity	1
HR Representative	Hailey Miller	Requested by	Ethan Carter
Business Unit	Honag US Consulting	Requested on	5/2/2011
Status Reason	Recruiting process		

**Publishing**

Company Name	Open Placement	Liste...	Liste...	Publishing...	Publication Site	Status Reason
HR Recruiting Age...	Senior Consultant - Honag U...	5/4/2011	7/31/2011	Internal	http://www.hrrecruitingagen...	In use

As default chart, **"Open Placements by Business Unit"** is displayed in the Outlook start screen of this entity. A bar chart shows how many open placements exist in which business unit.



#### 4.1.2.1 Main form

Microsoft Dynamics CRM | HUMAN RESOURCES | Open Placements | Senior Consultant -...

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

OPEN PLACEMENT : INFORMATION

### Senior Consultant - Honag US Consulting - 05/04/2011

Open Placement Received (Active) | Waiting For Applications | Recruiting Process | POST-Processing | Next Stage

✓ Job Profile *	Senior Consultant	✓ Publishing Type	External
✓ Business Unit	Honag US Consulting	✓ Costs	\$350.00
✓ Quantity *	1	✓ Status Reason *	Recruiting process

#### General

##### Details

Job Profile	Senior Consultant	Quantity	1
HR Representative	Hailey Miller	Requested by	Ethan Carter
Business Unit	Honag US Consulting	Requested on	5/2/2011
Status Reason	Recruiting process		

#### Applicants

Automatic | Bird's eye

World • United States

Status: Active

**"Job Profile"**: The user can select the job profile which the open placement is based on here.

**"Quantity"**: Enter how many identical vacancies are open at present.

**"HR Representative"**: The HR manager who is in charge of the open placement is selected here.

**"Requested by"**: The person who requested the vacancy.

**"Business Unit"**: The respective business unit or department where the open placement is located in can be chosen here.

**"Requested on"**: The date when the open placement was requested.

**"Status Reason"**: The user can select a status reason for the open placement. Here, he/she can choose between

- **"Waiting for authorization",**
- **"Waiting for applicants"** and
- **"Recruiting process".**

**"Publishing Type"**: Here you can select how the open placement is published. The user may choose between

- **"Internal",**
- **"External"** or
- **"Internal & External".**

**"Listed on"**: The day on which the open placement was published.

**"Costs"**: Here, the user may enter the amount of costs corresponding to a specific open placement.

**"Currency"**: The currency of the placement costs can be selected here.

**"Recruiting Channels"**: In the following sub-grid, you can choose where open placements are published.

**"Active Applicants"**: This sub-grid shows active applicants for the specific open placement.

**"Inactive Applicants"**: Here, inactive applicants concerning an open placement are displayed.

In addition, a "Bing" map shows you the places where the applicants for the specific open placement are located.

#### 4.1.2.2 Form "Recruiting Channel"

As **"Recruiting Channel"** is a separate entity, please see chapter 4.1.3 for details.



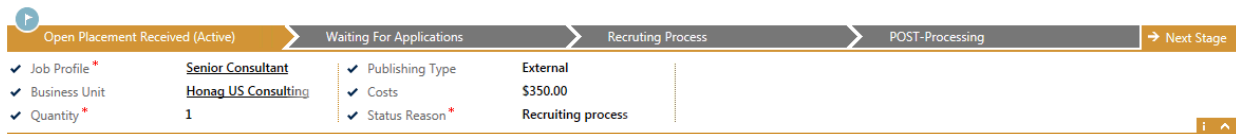
#### 4.1.2.3 Form "Applicants"

As **"Applicant"** is a separate entity, please see chapter 4.1.5 for details.

#### 4.1.2.4 Business Process Flow

OPEN PLACEMENT : INFORMATION

Senior Consultant - Honag US Consulting - 05/04/2011



A default business process flow for open placements was created. It includes the following stages and fields:

##### "Open Placement Received":

- "Job Profile",
- "Business Unit",
- "Quantity",
- "Publishing Type",
- "Costs" and
- "Status Reason".

##### "Waiting for Applications":

- "Status Reason".

##### "Recruiting Process":

- "Status Reason".

##### "Post-Processing":

- "All positions filled".

**Note:** Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.



### 4.1.3 Recruiting Channels

Company Name	Open Placement	Listed on	Listed until	Publishing Type
HR Recruiting Agency	Senior Consultant - Honag US Consulting - 05/04/2011	5/4/2011	7/31/2011	Internal
HR Recruiting Agency	Account Manager - Honag US Consulting - 05/05/2011	5/5/2011	7/31/2011	External
HR Recruiting Agency	Junior Consultant - Honag US Consulting - 04/26/2011	5/26/2011	6/30/2011	External

1 - 6 of 6 Page 1

**Internal - HR Recruiting Agency - Senior Consultant - Honag US Consulting - 05/04/2011 - 05/04/2011...**

**General**

Company Name	HR Recruiting Agency	Publishing Type	Internal
Open Placement	Senior Consultant - Honag US Consulting - 05...	Costs	\$350.00
Publication Site	<a href="http://www.hrrecruitingagency.com/honag/seni">http://www.hrrecruitingagency.com/honag/seni</a>	Currency	US Dollar
Listed on	5/4/2011	Owner	Hailey Miller
Listed until	7/31/2011	Status Reason	In use

**Notes**

There are no Notes for this Recruiting Channel.

Microsoft Dynamics CRM | HUMAN RESOURCES | Recruiting Channels | Internal - HR Recrui...

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

RECRUITING CHANNEL : INFORMATION

## Internal - HR Recruiting Agency - Senior Consultant - Honag US Consulting...

**General**

Company Name	HR Recruiting Agency	Publishing Type	Internal
Open Placement	Senior Consultant - Honag US Consulting - 05/04/2011	Costs	\$350.00
Publication Site	<a href="http://www.hrrecruitingagency.com/honag/seniorconsultant">http://www.hrrecruitingagency.com/honag/seniorconsultant</a>	Currency	US Dollar
Listed on	5/4/2011	Owner	Hailey Miller
Listed until	7/31/2011	Status Reason	In use

**"Company Name":** With this look-up field, the user may select an **"Account"** which is the recruiting channel for the respective open placement.

**"Publishing Type":** Here, you can select how the open placement is published. The user may choose between

- **"Internal"** or
- **"External"**.

**"Open Placement":** The respective open placement for the recruiting channel can be selected here.

**"Costs":** Here, the user may enter the amount of costs corresponding to a specific open placement of this recruiting channel.

**"Currency":** The currency of the placement costs for this recruiting channel can be chosen here.

**"Publication Site":** Enter the link of the page where the recruiting channel has posted the open placement.

**"Listed on":** The day on which the open placement was published by this recruiting channel.

**"Listed until":** The day until which the open placement is published by this recruiting channel.

**"Owner":** Owner of the record.

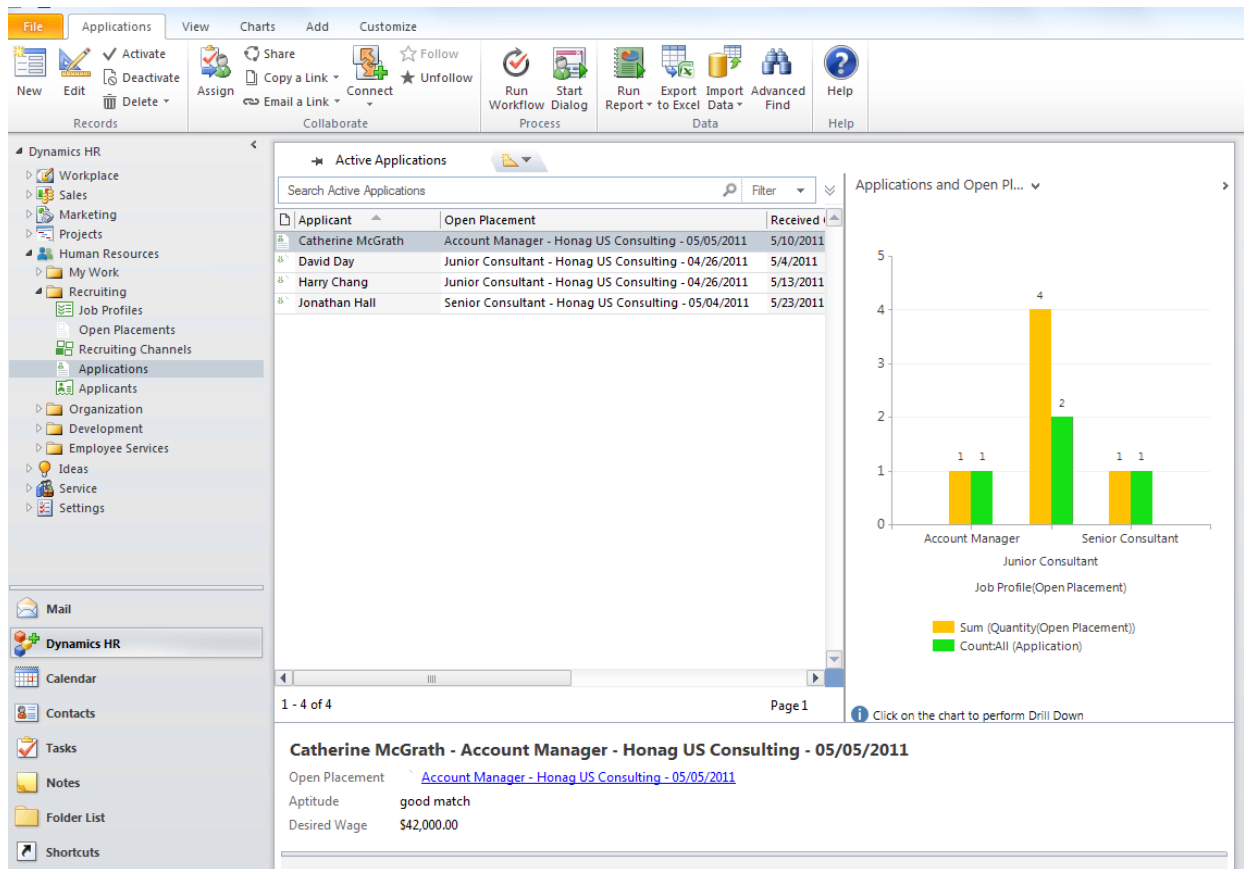
**"Status Reason":** The user can decide if the job profile is

- **"In use"** or in the



▪ **"Recruiting Channel Pool".**

#### 4.1.4 Applications



As default chart, **"Applications and Open Placements"** is displayed in the Outlook start screen of this entity. A column chart shows how many applications belong to how many open placements.





#### 4.1.4.1 Main form

APPLICATION : INFORMATION

### Catherine McGrath - Account Manager - Honag US Consulting - 0...

Application Received (Active) | First Validation | Interview Phase | Contract Negotiation | Next Stage

✓ Applicant *	Catherine McGrath	✓ Earliest Start Date	6/1/2011
✓ Open Placement *	Account Manager - Honag US Consulting	✓ Status Reason *	Contract Negotiation
✓ Received On	5/10/2011		

**General**

Applicant	Catherine McGrath	Open Placement	Account Manager - Honag US Consulting - 05/05/2011
Desired Wage	\$42,000.00	Currency	US Dollar
Received On	5/10/2011	Status Reason	Contract Negotiation
Received Via	External - HR Recruiting Agency - Account Manager - Honag US Consulting	Aptitude	good match
Earliest Start Date	6/1/2011		
Remarks HR	--		

**Related Activities**

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date ↑
Employment Contract - Cath...	Catherine...	Email	Completed	Hailey Miller	Normal		
RE: Employment Contract - C...	Catherine...	Email	Completed	Hailey Miller	Normal		
Application for Account Man...	Catherine...	Email	Completed	Hailey Miller	Normal		
Check application	Catherine...	Task	Completed	Ethan Carter	Normal	5/12/2011 8:00 AM	5/12/2011 8:00 AM

Status: **Active**

**"Applicant"**: The person who has submitted an application can be selected in this look-up field.

**"Open Placement"**: Here, applications can be connected to the applicable open placement/vacancy.

**"Desired Wage"**: The wage which the applicant desires to receive.

**"Currency"**: Currency of the desired wage.

**"Received On"**: The date when the application was received.

**"Received Via"**: The recruiting channel from the application was received can be selected.

**"Status Reason"**: The user can select a status reason for each application. Here, he/she can choose between

- **"Received",**
- **"First Validation",**
- **"Invited for 1<sup>st</sup> interview",**
- **"Invited for 2<sup>nd</sup> interview"** and
- **"Contract Negotiation".**

**"Aptitude"**: The HR representative may give a first estimate of the applicant's aptitude. He/she may select between

- **"good match",**
- **"average match"** and
- **"poor match".**

**"Earliest Start Date"**: Enter the date from which the applicant can start working here.

**"Remarks HR"**: Any comments or reasons, e.g. for the chosen **"Status Reason"** can be entered here.

**"Related Activities"**: All activities which are assigned to this application are shown in this sub-grid.

**"Skill Level Quick View"**: In this sub-grid, a matching between the skill levels necessary for the open placement and those of the applicant is shown.

In order to see the skill levels, the user needs to press the **"Prepare Rating"** button on top and save the record. The following use cases may appear:



- A skill is not assigned to a contact (applicant or employee) --> Then, a skill level will be created. The skill level value for the job profile is empty, the required experience value will be taken from the job profile.
- A skill is assigned to a contact and its required experience value is empty or lower than the value for the job profile --> If this is the case, the value for the required value will be changed to the value of the job profile.
- A skill is assigned to a contact and its required experience value is higher than the value for the job profile --> Then, the value for the required value will not be changed.

#### 4.1.4.2 Form "Activity"

As **"Activities"** are separate entities, please see chapter 6.2 for details.

#### 4.1.4.3 Form "Skill Level"

As **"Skill Level"** is a separate entity, please see chapter 4.3.5 for details.

#### 4.1.4.4 Business Process Flow

APPLICATION : INFORMATION

Catherine McGrath - Account Manager - Honag...

Open Placement Account Manager	Aptitude good match	Desired Wage \$42,000.00
-----------------------------------	------------------------	-----------------------------

Application Received (Active) → First Validation → Interview Phase → Contract Negotiation → Next Stage

✓ Applicant*	Catherine McGrath	✓ Earliest Start Date	6/1/2011
✓ Open Placement*	Account Manager - Honag...	✓ Status Reason*	Received
✓ Received On	5/10/2011		

A default business process flow for applications was created. It includes the following stages and fields:

##### "Application Received":

- **"Applicant"**,
- **"Open Placement"**,
- **"Received On"**,
- **"Earliest Start Date"** and
- **"Status Reason"**.

##### "First Validation":

- **"Aptitude"**,
- **"Cover letter available"**,
- **"CV available"**,
- **"Referral available"** and
- **"Status Reason"**.

##### "Interview Phase":

- **"Status Reason"**.

##### "Contract Negotiation":

- **"Related tasks completed"** and
- **"Negotiations completed"**.

**Note:** Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.

The existing job refusal workflow now runs automatically when the respective application record is deactivated with the status reason **"Rejected by company + Auto Refusal"**.



## 4.1.5 Applicants

The screenshot shows the Dynamics HR interface. The left sidebar contains a navigation tree with 'Applicants' selected under 'Human Resources'. The main area displays 'Active Applicants' with a map view selected. The map shows the United States with a search bar 'World • United States • KS'. Below the map is a table of applicants:

Full Name	Address 1: Street 1	Address 1: ZIP/Postal Code	Address 1: City	Address 1: Country/R
Catherine McGrath	3915 SE Steel Street	97202	Portland	United States
David Day	1644 31st Street NW	20007	Washington	United States
Harry Chang	385 7th Street E	55101	St. Paul	United States
Jonathan Hall	1100 Michigan Avenue	88310	Alamogordo	United States

Below the table, the details for Catherine McGrath are shown, including her email (Catherine\_McGrath@outlook.com) and HR Representative (Patrisha Anderson).

As applicants are part of the entity **"Contact"**, the user might have to select and pin a respective view concerning applicants as described in chapter 3.

The **"Chart"** section shows e.g. in a **"Bing"** map where all the applicants are located. Here, **"Persons shown on a map"** has to be selected.

The screenshot shows the Dynamics HR Applicant detail form for Catherine McGrath. The top navigation bar includes 'HUMAN RESOURCES', 'Applicants', and 'Catherine McGrath'. The form displays the following information:

- Contact Type:** Applicant
- Classification:** --
- Salutation:** Mrs.
- First Name:** Catherine
- Middle Name:** --
- Last Name:** McGrath
- Status:** Active
- Preferred Method of Contact:** Any
- Email:** Catherine\_McGrath@outlook.com
- Home Phone:** +1 (503) 3741

The 'Notes & Activities' section shows 'No Notes found'.



To enter and maintain applicant data, we use the Microsoft Dynamics standard **"Contact"** entity. Here, business and private data, personal reasons, activities and project management data are included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to applicants in detail.

Instead, we've added the field **"Contact type"**. The user can select from the following types:

- **"Contact"**,
- **"Applicant"** and
- **"Employee"**.

This way, you can easily transfer an applicant to an employee with one click.

When an applicant is created, only the tab **"Business Data"** is shown. Only if **"Interesting Candidate"** is selected from the picklist **"Classification"**, the fields of the tabs **"Private Data"**, **"Details"** and **"Notes & Activities"** are displayed. This also includes a **"Bing Maps"** integration which shows the location of the applicant.



## 4.2 Employee Organization

The **"Organization"** section of **"xRM1 HR Management"** provides all relevant employee data. Applicants can easily be converted to employees.

Business units, facilities and equipment can be organized with the corresponding person responsible.

Corresponding wages and salary models are available for every employee.

Available processes can be defined and equipped with the employees responsible. Allocate resources and track your processes using the RACI model; this makes resource planning easy!

Employee onboarding and offboarding is easily done with templates. Simply connect to the project management section of **"CRM-Project"** and use the available templates.

**"xRM1 HR Management"** enables you to submit absences from one central point in HR management.

Employee contracts and all corresponding information can be easily organized; this can also include disciplinary measures. Add documents or store them directly in your system.

### 4.2.1 Onboarding/Offboarding

The screenshot displays the xRM1 HR Management software interface. The top menu bar includes 'File', 'Projects', 'View', 'Charts', 'Add', and 'Customize'. Below this is a toolbar with various icons for actions like 'New', 'Edit', 'Deactivate', 'Delete', 'Assign', 'Share', 'Copy a Link', 'Email a Link', 'Connect', 'Follow', 'Unfollow', 'Run Workflow Dialog', 'Start Process', 'Run Report', 'Export to Excel', 'Import Data', 'Advanced Find', 'Help', 'Import Project', 'Fast Time Entry', and 'Employee Cockpit'. The left sidebar shows a navigation tree with categories like 'Favorites', 'Hailey.Miller@honag.com', 'Dynamics HR', and 'Mail'. The main content area is titled 'All Active Projects' and shows a list of projects. The selected project is 'Honag Onboarding Tom Tailor'. Below the list, the project details are displayed, including 'Customer: Honag Hawaii LLC', 'Priority', 'End projected: 6/30/2011', 'External Information', 'Internal Information', and 'Duration'.

Title (Internal)	Status Reason	Progress	Billing	Actual MD (Σ)	MD Projected (Σ)
Pre-production	Planning				
Honag Onboarding Tom Tailor	Planning				

1 - 21 of 21 Page 1

#### Honag Onboarding Tom Tailor

Customer [Honag Hawaii LLC](#)

Priority

End projected 6/30/2011

#### External Information

Customer [Honag Hawaii LLC](#)

Title (Customer) Honag Onboarding Tom Tailor

#### Internal Information

Title (Internal)	Honag Onboarding Tom Tailor		
Owner	<a href="#">Hailey Miller</a>	Status Reason	Planning
Level	Project	Ident Number	PRO0093
Priority		Division	
Risk		Classification	
Billing		Code	
Parent Project Part			

#### Duration

Real Start	
Start projected	6/5/2011
Last Activity	
End projected	6/30/2011
Fixed Date	No



#### 4.2.1.1 Main form

PROJECT : PROJECT MANAGER ▾

## Honag Onboarding Tom Tailor

Customer: **Honag Hawaii** Priority: -- End projected: 6/30/2011

### General

External Information		Internal Information	
Customer *	Honag Hawaii LLC	Title (Internal) *	Honag Onboarding Tom Tailor
Title (Customer)	Honag Onboarding Tom Tailor	Owner *	Hailey Miller
Progress (auto)	--	Level	Project
		Priority	--
		Risk	--
		Billing	--
		Parent Project Part	--

### Duration

Real Start	Last Activity	Fixed Date	No
Start projected	End projected		
6/5/2011	6/30/2011		

### Budget

Status Reason	Level	Project
Planning		

You can find project templates for employee onboarding and offboarding on our website: [www.xRM1.com](http://www.xRM1.com).

For detailed information on how to create a project from a template, please see chapter 4.2.1.2. For an introduction on how to import a project plan from Microsoft Project, please see chapter 4.2.1.3.

**Note:** After having created a project from our template, select **"HR Project"** in the **"Classification"** field of the project form. Only then, the project appears in the **"Onboarding/Offboarding Projects"** view.

Below is an overview of project information which is stored in the system. Information in project data fields, as well as a corresponding project node, is divided into the following categories:

- **"General"**: General project information.
- **"Duration"**: Time related information within the project.
- **"Work"**: All information pertaining to man-days within the project.
- **"Costs"**: All information pertaining to a project's monetary costs.
- **"Budget"**: The budget calculated for the project.
- **"Sales"**: Information pertaining to man-days which were quoted to the customer.
- **"Description & Notes"**: Information concerning project content, tasks, project goals and more detailed notes.
- **"Settings"**: Settings and values pertaining to the project.

**Note:** Some fields cannot be edited as they are automatically filled in by the system. These write protected fields can be identified by their grey backgrounds.

#### 4.2.1.2 Creating a project from a template

To create a template from a project, simply select the required project template under the "Templates approved" view and run template process.

There are various automation functions available in the project creation process, to help you create a project as accurately as possible.

Firstly, you can define a **"date"** which will be used as a start or end date for the planned project. With this date, the template function pushes all dates forward (for start date) or backward (for end date) for all nodes and activities in the template.

The title of the template (both internal and external), as well as all activities, can be filled automatically with project-related information with the Find and Replace. Specify in the **"Find"** field the term you have entered as a placeholder in the nodes and template activities. Specify in the **"Replace"** field the term(s) which will be used for replacement.

Select the **"Account"** which the newly created project is assigned to.

Select the **"Currency"** of the new project.

Select whether all **project parts and activities** are assigned to the users defined in the template or the user running the template function is assigned all project elements. Then, project parts and activities can be distributed manually if required.



If resources have already been defined in the template via the planning table, the **distribution of work** to these resources can also be used for the new project.

#### <Template> Implementation 4th module

To change the template state or to generate a new project out of the template, choose the desired options, set the parameters (if necessary) and click 'Start'

This might take some minutes, depending on the chosen options, parameters or the size of your project.

Template in status 'Approved' [inactive]. Available functions:

☐ Edit template  
☒ Generate Project from Template.

Select the date which is used for generating the new project:

6/2/2011   15   
☒ Use date as start projected.  
☐ Use date as end projected.

Find and replace text in Title (Customer) and Title (Internal):

Find:   
Replace:

Account:

Currency:

Assignments of tasks and project nodes in the generated project.

☐ Assign everything to the users defined in the template.  
☒ Assign everything to myself.

Allocate resources as defined in the template.

☐ Yes  
☒ No

Copy Notes from template

☐ Yes, Copy all Notes from template  
☒ No, ignore all Notes

Selecting Start begins the 'project from a template' process. Your predefined project will be generated from the template.

#### 4.2.1.3 Microsoft Project Import

The Microsoft Project interface provides functionality for creating new projects based on Microsoft Project project plans.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'PROJECTS', and 'Projects'. The main area displays a table of 'All Active Projects'. A context menu is open over the table, showing options like 'Export to Excel', 'Import Data', 'Advanced Find', 'Import Project', 'Employee Cockpit', 'Fast Time Entry', 'Chart Pane', 'View', 'New System View', 'Customize Entity', and 'System Views'. The 'Import Project' option is highlighted.

Title (Internal)	Status Reason	Progress	Billing	Estimated (€)	End projected
BAG Projektmanagement Einführung	Processing		Time & Material	23.00000	6/30/2011
BLI Project Management Implementation	Processing		Time & Material	23.00000	6/30/2011
BAG PS CRM Einführung	Planning	8.59	Time & Material	32.00000	6/30/2011
BLI DB CRM Implementation	Planning	8.59	Time & Material	32.00000	6/30/2011
Kommunikation der Unternehmensstrategie	Processing				6/30/2011
Customer Trainings	Processing				6/30/2011
Honag Intern Server Update USA	Processing	0.00	No	10.00000	7/1/2011

##### 4.2.1.3.1 Prepare Import

To import a Microsoft Project project plan in CRM-Project, the plan has to first be based on CRM-Project's Microsoft Project import template. Therefore, you must first download the Microsoft Project import template from Microsoft Dynamics.





Microsoft Dynamics CRM | PROJECTS | Projects | Create | Hailey Miller Honag

NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT

All Active Projects

Title (Internal)	Status Reason	Progress	Billing
BAG Projektmanagement Einführung	Processing	Time & Me	
BLI Project Management Implementation	Processing	Time & Me	
BAG PS CRM Einführung	Planning	8.59	Time & Me
BLI DB CRM Implementation	Planning	8.59	Time & Me
Kommunikation der Unternehmensstrategie	Processing		
Customer Trainings	Processing		
Honag Intern Server Update USA	Processing	0.00	No

Export to Excel | Import Data | Advanced Find | Import Project | Employee Cockpit | Fast Time Entry | Chart Pane | View | New System View | Customize Entity | System Views

Search for records

Download Template for L...

25.00000 6/30/2011

32.00000 6/30/2011

32.00000 6/30/2011

10.00000 7/1/2011

The system creates a template for Microsoft Project as an XML file. Save this file and open it with Microsoft Project.

File | Task | Resource | Project | View | Team | Format

Gantt Chart | Paste | Cut | Copy | Format Painter | Clipboard | Calibri | 11 | 0% | 25% | 50% | 75% | 100% | Mark on Track | Respect Links | Inactivate | Manually Schedule | Auto Schedule | Inspect | Move | Mode | Task | Milestone | Deliverable | Insert | Information

Timeline

Start Fri 12/2/11

8:00 AM | 9:00 AM | 10:00 AM | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00

Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	CRM-Project
1	To use this template, add	1 day	Fri 12/2/11	Fri 12/2/11			LEVEL/PROJECT
2	Um die Vorlage zu verwe	1 day	Fri 12/2/11	Fri 12/2/11			LEVEL/PROJECT

Use this template for planning and structuring your project in Microsoft Project. Choose **"Add new Column"** to display the column **"Outline 1 (CRM-Project)"**. Through this classification, you can define whether each Microsoft Project task is a project node or a Microsoft Dynamics activity. Furthermore, you can select the project node level and activity type.

LEVEL Project Level

- PROJECT Project
- PROGRAM Program
- PHASE Phase
- SUBPROJECT Subproject
- ACTIVITYPACKAGE Activity Package
- MILESTONE Milestone
- ACTIVITIES Activities
  - EMAIL E-Mail
  - TASK Task
  - RENDEREDSERVICE Rendered Service
  - LETTER Letter
  - FAX Fax
  - PHONECALL Phonecall
  - APPOINTMENT Appointment
  - SERVICEACTIVITY Service Activity

The following levels are available for classifying project nodes:

- Program
- Project
- Phase
- Subproject
- Activity Package
- Milestone

The following activity types are available for classifying activities:

- E-mail
- Task
- Rendered Service
- Letter
- Fax
- Phone call
- Appointment
- Service activity





Once you have finished structuring your project, save the project plan in Microsoft Project XML format. The project plan is now ready for **CRM-Project** import.

**Note:** CRM-Project is able to import Microsoft Project project plans only if they are based on the import template and if they are saved as Microsoft Project XML format!


#### 4.2.1.3.2 Process import


To import your prepared project plan, select "Import Project" in the ribbon menu bar. Choose the account which will be the customer for the new CRM-Project project. Then, choose the project's currency. In most cases, an account will be your company or a standard account in your Microsoft Dynamics.

Select **"Import"** to select the Microsoft Project file. The project will then be created in CRM-Project and be available as a "Planned Project".




**Import Project**  
Import a Microsoft Project Plan as a new project in CRM-Project.

 Please make sure that the imported project plan is based on the Microsoft Project Template and that all project levels and activities are classified properly.

 Retrieving Entity's metadata  
Retrieving Entity's metadata

Select the account and currency for the imported project:

Account:  

Currency:

Select Microsoft Project XML file for import

While processing the import, the following information is transferred from the Microsoft Project Project plan to CRM-Project:

Information in Microsoft Project Plan	Import assigns information to the following Microsoft Dynamics field for	
	<b>Project nodes</b>	<b>Activities</b>
<b>Task Name</b>	Title internal and Title customer	Subject
<b>Notes</b>	Description	Description
<b>Start</b>	Start projected	Start Time (only Appointment and Service Activity)
<b>Finish</b>	End projected	End Time (only Appointment and Service Activity) Due (all other Activity Types)
<b>Work</b>	MD projected (1 MD = 8 hours)	Work
<b>Predecessor</b>	Predecessor	-
<b>Parent Task</b>	Parent Project Part	Regarding
<b>CRM-Project Classification</b>	Level	Defines the Microsoft Dynamics Activity Type



## 4.2.2 Employees

The screenshot displays the xRM1 HR Management interface. The top navigation bar includes tabs for File, Contacts, View, Charts, Add, and Customize. Below this is a ribbon with various actions like New, Edit, Activate, Deactivate, Merge, Detect Duplicates, Send Direct Email, Add to Marketing List, Assign, Share, Copy a Link, Email a Link, Connect, Follow, Unfollow, Run Workflow, Start Dialog, Run Report, Export to Excel, and Import Data.

The left sidebar shows a tree view with categories like Favorites, Dynamics HR, and Mail. Under Dynamics HR, the 'Employees' option is selected.

The main content area shows the 'Active Employees' list. The list has columns for Full Name, Current Job Profile, Department, Business Phone, and Email. The following table represents the data shown in the list:

Full Name	Current Job Profile	Department	Business Phone	Email
Ethan Carter		Honag US CRM International	+1 (212) 4337-101	Ethan.Carter@h
Grace Harris		Honag Hawaii Training Limited	+1 (808) 1734-106	Grace.Harris@h
Hailey Miller		Honag US CRM International	+1 (212) 4337-102	Hailey.Miller@h

Below the list, the detailed view for Hailey Miller is shown. It includes the following information:

- Contract Type:** Full-time
- Private E-mail:**
- Home Phone:** +1 (718) 453897

The 'Name' section includes:

- Contact Type:** Employee
- Salutation:**
- First Name:** Hailey
- Middle Name:**
- Last Name:** Miller
- Job Title:** HR Manager
- Employing Company:**
- Business Phone:** +1 (212) 4337-102
- Mobile Phone:**
- Fax:**
- Email:** [Hailey.Miller@honag.com](mailto:Hailey.Miller@honag.com)
- System User:** [Hailey Miller](#)

The 'Address' section includes:

- Street 1:** 8801 Queens Boulevard
- Street 2:**
- City:** Elmhurst
- State/Province:** New York
- ZIP/Postal Code:** 11373
- Country/Region:** [United States](#)
- Home Phone:** +1 (718) 453897
- Private E-mail:**

At the bottom, there is a link to 'See more about: Hailey Miller.' and a small profile picture icon.

As employees are part of the entity **"Contact"**, the user might have to select and pin a respective view concerning employees as described in chapter 3.

The **"Chart"** section shows e.g. in a **"Bing"** map where all the employees are located. Here, **"Persons shown on a map"** has to be selected.



WORKPLACE

Contacts

Hailey Miller

+

Hailey Miller  
Honag

?

+ NEW

DEACTIVATE

CONNECT

ADD TO MARKETING LIST

ASSIGN

...

↑

↓

🖨

CONTACT: EMPLOYEE

Hailey Miller

Contract Type  
Full-time

Private E-mail  
--

Home Phone  
+1 (718) 4538

This is a special form for Human Resource Management. To go back to the regular Contact Form, select "Contact" in the field "Contact Type"

Business Data

Contact Type	Employee	Employing Company	--
Salutation	--	Business Phone	+1 (212) 4337-102
First Name	Hailey	Mobile Phone	--
Middle Name	--	Fax	--
Last Name	Miller	Email	Hailey.Miller@honag.com
Job Title	HR Manager	System User	Hailey Miller

NOTES

Enter a note

No Notes found.

Professional Information

Manager	Ethan Carter	Department	Honag US CRM International
		Cost Center	--

HR Management

Details	Contract	Bank Data
Employee ID	Hired By	Account Holder
Full Time Equivalent	Hired On	Bank Account Number
Current Job Profile	Start Date	Name of Financial Institi
Work Place	Probation Until	Bank Code
Education	Contract End	IBAN
Social Security Number	Employment Duration	BIC
Employee Type	Work Hours per Week	Bank Routing
	Contract Type	
Status	Active	Full-time
Owner	Hailey Miller	

For entering and maintaining employee data, xRM1 uses the Microsoft Dynamics standard entity **"Contact"**. Business and private data, personal reasons, activities and project management data are all included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to employees in detail.

Instead, we've added the **"Contact type"** field, as well as the specific **"HR Management"** fields, which contain data concerning an employee's contract, HR details, health and bank data and (if applicable) information concerning an employee resignation or dismissal.

When the fields **"Start Date"** and **"Contract End"** are changed here, the respective fields in the **"Job History"** entity are also updated automatically.

Furthermore, a **"Bing Maps"** integration was included which shows the location of the employee.



### 4.2.3 Employment Contracts

File Employment Contracts View Charts Add Customize

New Edit Delete Assign Share Follow Unfollow Run Workflow Start Dialog Run Report Export to Excel Import Data Advanced Find Help

Records Collaborate Process Data

Dynamics HR

- Workplace
- Sales
- Marketing
- Projects
- Human Resources
  - My Work
  - Recruiting
  - Organization
    - Onboarding/Offboarding
    - Employees
    - Employment Contracts
    - Wages
    - Absence Administration
    - Disciplinary Measures
    - Processes
    - Process Resources
    - Departments
    - Facilities/Equipment
  - Development
  - Employee Services
  - Ideas
  - Service
  - Settings
- Mail
- Dynamics HR
- Calendar
- Contacts
- Tasks
- Notes
- Folder List
- Shortcuts

Active Employment Contracts

Search Active Employment Contracts Filter

Employee	Start Date	End Date	Type
Catherine McGrath	7/1/2011	None	Full-time
Daniel Brown	3/1/2009	None	Internship
Ethan Carter	2/1/2009	None	Part-time
Hailey Miller	1/1/2009	None	Full-time
Paul Morrison	4/1/2010	None	Full-time
Robert Bonderman	8/15/2009	None	Trainee
Tom Seel	6/15/2009	6/15/2011	Contract worker

1 - 7 of 7 Page 1

Employment Contract Types by...

Click on the chart to perform Drill Down

Catherine McGrath - Full-time - 07/01/2011

General

Employee [Catherine McGrath](#) Type Full-time

Start Date 7/1/2011 Classification Permanent

End Date -- HR Representative [Patrisha Anderson](#)

Status Reason In Progress

Section

File Attachment

6/2/2011 (Patrisha Anderson)

[Employment Contract Catherine McGrath.pdf](#)

Latest 1 Note of 1

As default chart, "**Employment Contract Types by Business Unit**" is displayed in the Outlook start screen of this entity. A bar chart shows which contract types appear how often in the business units.

HUMAN RESOURCES Employment Contra... Catherine McGrath...

NEW DEACTIVATE DELETE ASSIGN SHARE

EMPLOYMENT CONTRACT : INFORMATION

## Catherine McGrath - Full-time - 07/01/2011

General

Employee\* [Catherine McGrath](#) Type Full-time

Start Date 7/1/2011 Classification Permanent

End Date -- HR Representative\* [Patrisha Anderson](#)

Status Reason In Progress

Notes

NOTES

Enter a note

File Attachment

[Employment Contract Catherine McGrath.pdf](#)

[Patrisha Anderson](#) - Today 9:43:56 AM

Status Active

**"Employee":** Select which person the employee contract is for.

**"Start Date":** The day the employee contract starts.

**"End Date":** The day when the employee contract ends.



**"Type":** The user may choose from several contract types:

- **"Full-time",**
- **"Part-time",**
- **"Temporary work",**
- **"Trainee",**
- **"Student",**
- **"Internship" or**
- **"Contract worker".**

**"Classification":** Here, the user selects if the employee contract is

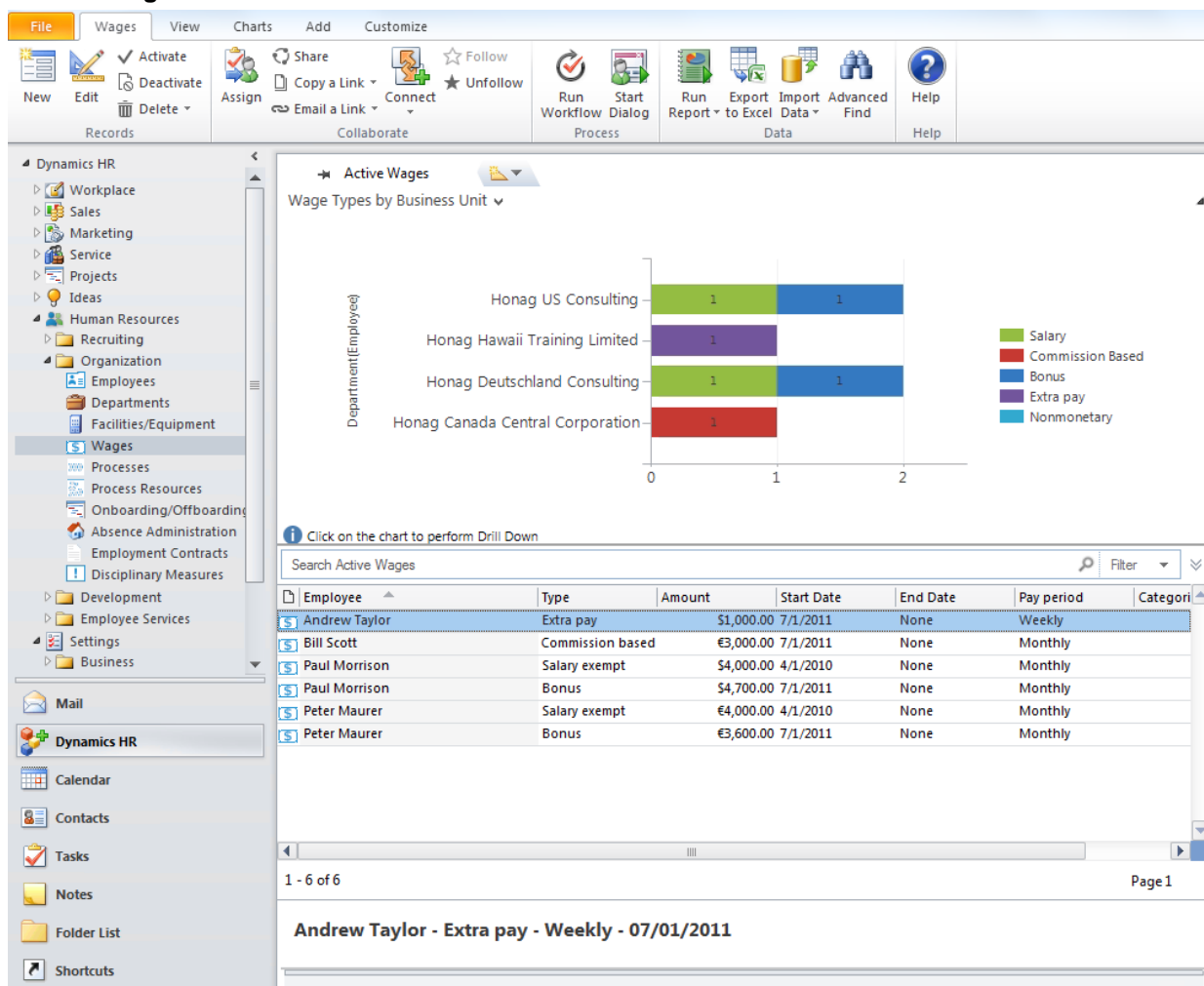
- **"Permanent" or**
- **"Fixed Term".**

**"HR Representative":** HR Representative which is responsible for this employment Contract:

**"Status Reason":** The user can select a status reason for each employee contract. Here, he/she can choose between

- **"Draft",**
- **"In progress" and**
- **"Valid".**

#### 4.2.4 Wages



As default chart, **"Wage Types by Business Unit"** is displayed in the Outlook start screen of this entity. A bar chart shows which wage types appear how often in the business units.



HUMAN RESOURCES

Wages

Bill Scott - Commiss...

Hailey Miller  
Honag

NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

...

WAGE : INFORMATION

Bill Scott - Commission based - Monthly - 07/01/2011

General

Employee	<a href="#">Bill Scott</a>	Start Date	7/1/2011
Type	Commission based	End Date	--
Pay period	Monthly	Currency	<a href="#">US Dollar</a>
Amount	\$3,000.00	HR Representative *	<a href="#">Hailey Miller</a>
Status Reason	Agreed		
Remarks	--		

Notes

Status	Active
--------	--------

**"Employee"**: The person whose wage is displayed.

**"Type"**: Several types of wages can be selected here. The user can choose between:

- **"Salary exempt",**
- **"Salary non-exempt",**
- **"Hourly",**
- **"Commission based",**
- **"Bonus",**
- **"Extra pay"** or
- **"non-monetary".**

**"Pay period"**: Enter the payment interval:

- **"Weekly",**
- **"Bi-weekly",**
- **"Monthly",**
- **"Annually"** or
- **"One-time".**

**"Amount"**: The user can enter the wage amount here.

**"Status Reason"**: The user can select a status reason for each employee contract. Here, he/she can choose between

- **"Draft",**
- **"Agreed"** and
- **"In discussion".**

**"Start Date"**: The day, from which the wage is paid.

**"End Date"**: The day, until which the wage is paid.

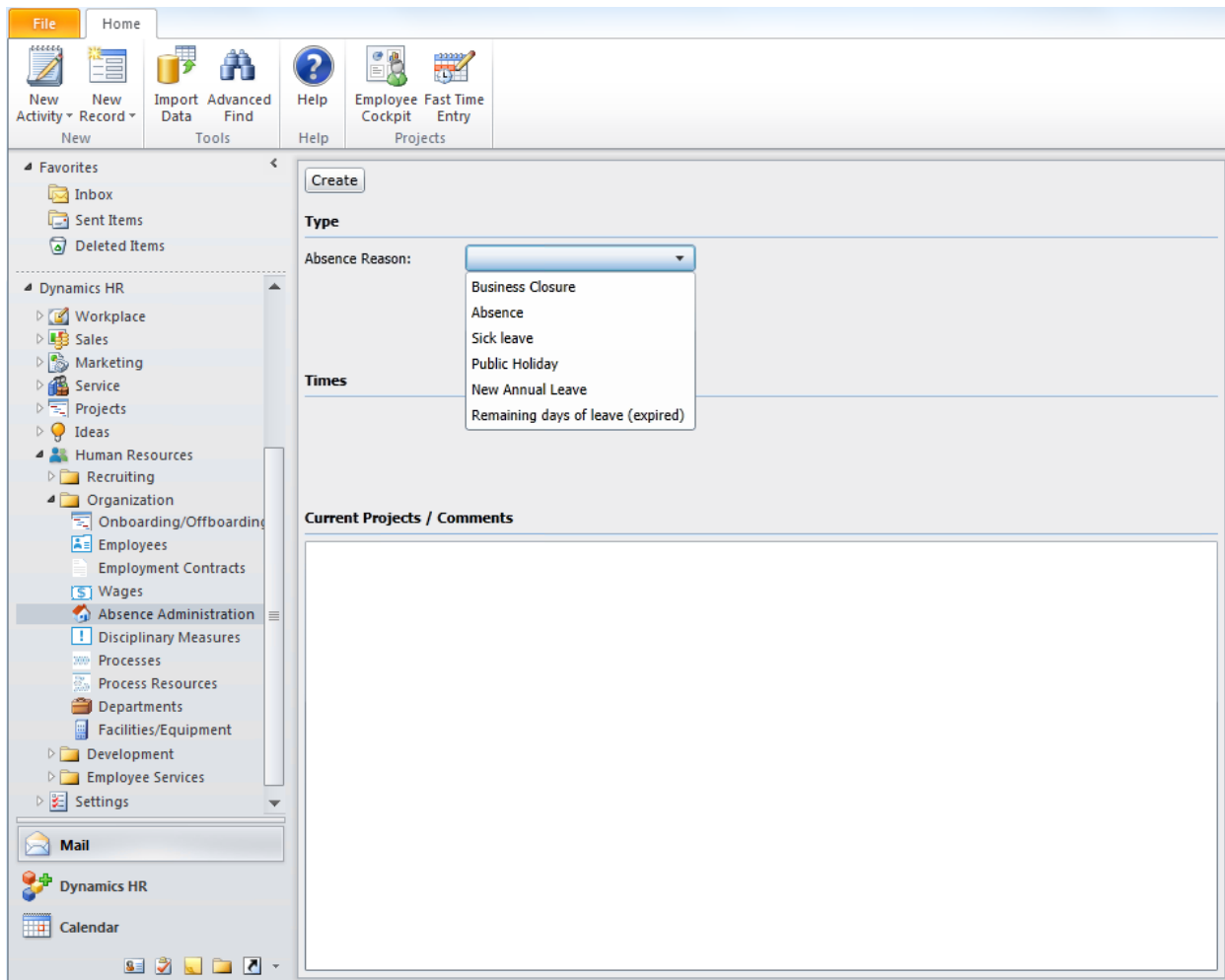
**"Currency"**: The wage currency per unit can be selected here.

**"HR Representative"**: Users can enter the HR manager responsible for employee here.

**"Remarks"**: You can enter any comments concerning wage here.



#### 4.2.5 Absence Administration



After selecting the **"Absence Administration"** in Outlook, the goldbright screen which is identical to the one in Microsoft Dynamics appears immediately instead of the Outlook start screen.

**"Absence Reason":** Here, the user can select what the reason for the absence is:

- **"Business Closure",**
- **"Absence",**
- **"Sick leave"**
- **"Public Holiday"** or
- **"New Annual Leave".**

You can also administer expired **"Remaining days of leave"**.

**"Employee":** Choose which employee is absent.

**"Times – Start":** The day and time the absence starts.

**"Times – End":** The day and time the absence ends.

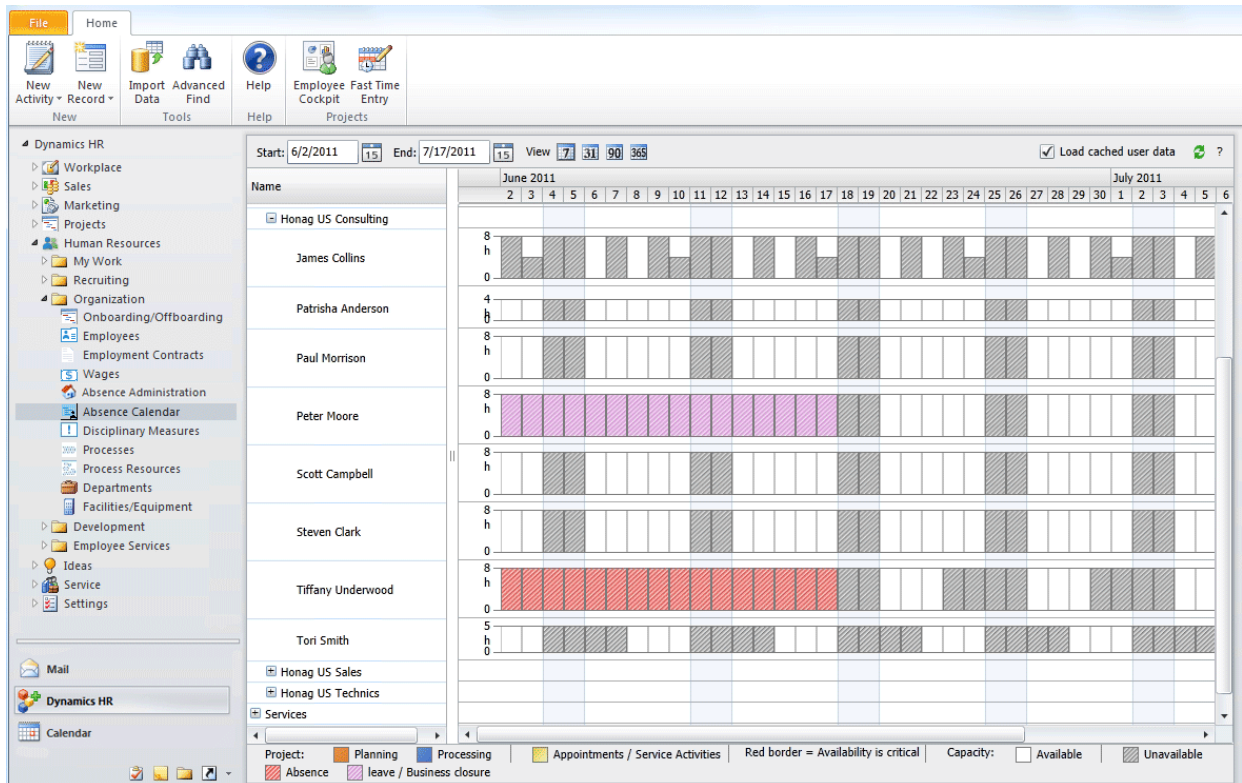
**"Whole Day Event":** If the absence is compiled of full work days, the user has to select this box.

**"Days"/"Days of leave":** The user can enter the amount of absence days here.

For absence administration settings, please see chapter 2.1.



## 4.2.6 Absence Calendar



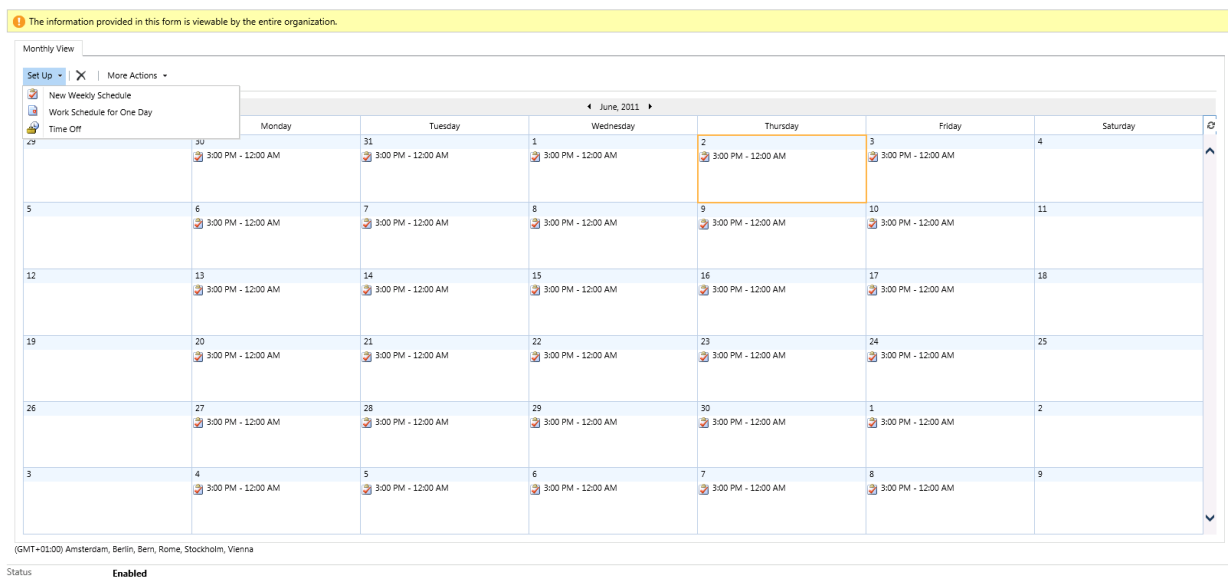
### 4.2.6.1 Prerequisites

The fundamental prerequisite for the absence calendar are up-to-date information on the availability of existing resources, especially in terms of attendance, leaves and sickness. This is why the following settings concerning employee work hours must be configured beforehand in the system.

For information on the availability of employees to be shown correctly, the work hours of employees must be set correctly in the system. This is a standard function of Microsoft Dynamics. The settings must be configured in the calendar of individual users.

USER : CRM-PROJECT HR MANAGER

Paul Morrison







Save and Close Help

Weekly Schedule

**Set the recurring weekly schedule**

Work Hours ☒ Are the same each day [Set Work Hours](#)  
☐ Vary by day  
☐ None. Resource is not working

Work Days ☒ Sun ☒ Mon ☒ Tue ☒ Wed  
☒ Thu ☒ Fri ☒ Sat

Business Closures ☐ Observe  
☒ Do not observe

**Date Range**

Starting On 6/2/2011 No End Date

Time Zone (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, ...

**Note:** Always set the selection to **"Observe"** in the **"Business closures"** area to ensure that public holidays and vacation are shown correctly in resource planning.

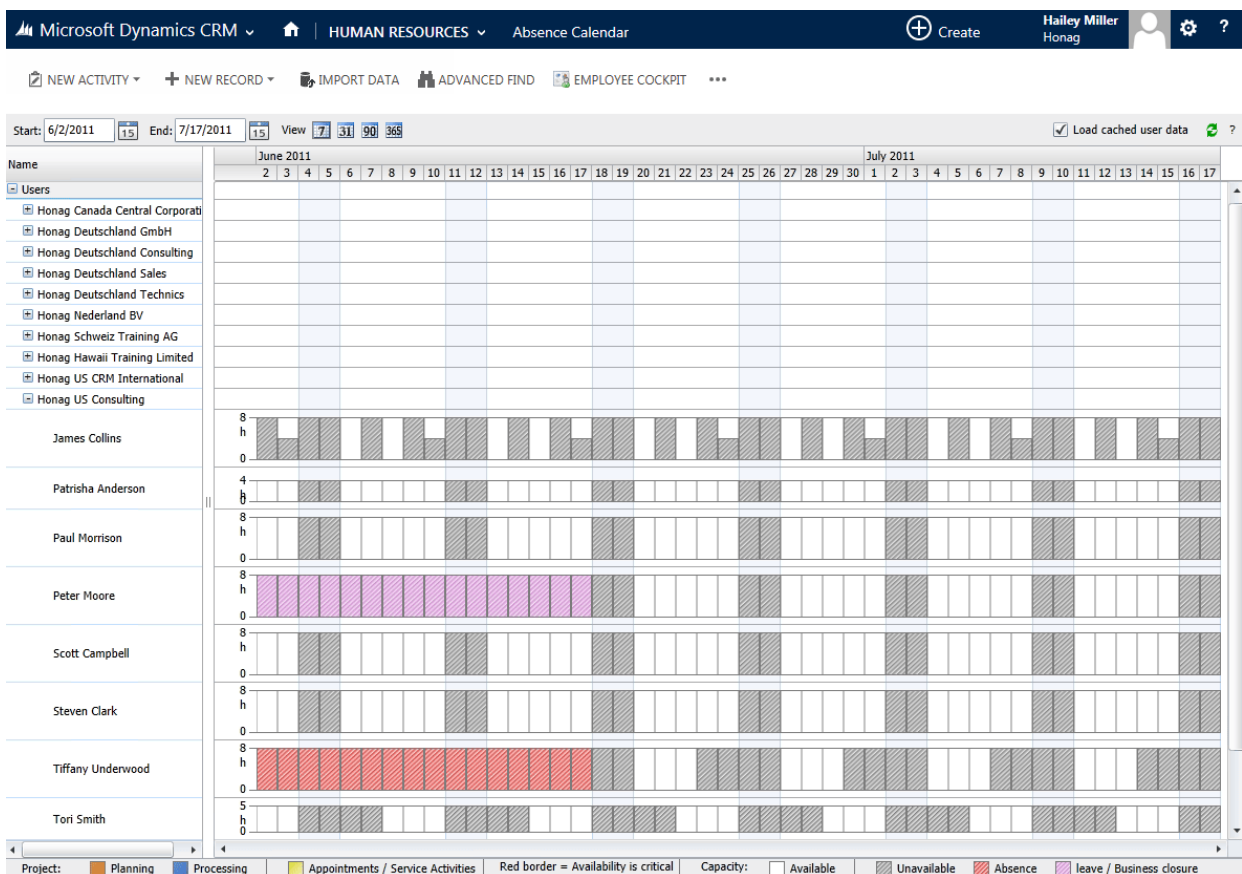
#### 4.2.6.2 Form

This view displays the availability of all employees. Work hours per day, attendances, absences, leaves/business closure and unavailability are shown in different colors:

- white = **"Available"**,
- grey = **"Unavailable"**,
- red = **"Absence"** and
- purple = **"Leave/Business Closure"**.

Therefore, employees can be scheduled faster and more easily. All parts of a useful workforce management can be seen at a glance.

**Note:** When you use **"CRM-Project"** as well, the **"Absence Calendar"** shows besides attendances and leaves also the resource usage.





**Tip:** For more details on the activities scheduled for an employee on a particular day, simply move the mouse to that day; displayed next to the mouse, as a tool, is the specific day schedule.

#### 4.2.7 Disciplinary Measures

**Active Disciplinary Measures**

Level	Reason	Employee	Date	Status Reason
verbal	Repeated tardiness	Paul Morrison	12/3/2010	Valid
verbal	Insulting the superior	Tom Seel	4/11/2011	Valid
written	Repeated insulting the superior	Tom Seel	5/30/2011	Valid

**Disciplinary Measures by Business Unit**

**Repeated tardiness**

**General**

Reason	Repeated tardiness	Date	12/3/2010
Employee	<a href="#">Paul Morrison</a>	HR Representative	<a href="#">Hailey Miller</a>
Level	verbal	Status Reason	Valid
Remarks	At least 5 times from Sept to Nov, 2010		

**Notes**

There are no Notes for this Disciplinary Measure.

As default chart, **"Disciplinary Measures by Business Unit"** is displayed in the Outlook start screen of this entity. A bar chart shows how many disciplinary measures of which level were given in the business units.

**HUMAN RESOURCES** | **Disciplinary Measures** | **Repeated tardiness**

**DISCIPLINARY MEASURE : INFORMATION**

## Repeated tardiness

**General**

Reason	Repeated tardiness	Date	12/3/2010
Employee	<a href="#">Paul Morrison</a>	HR Representative *	<a href="#">Hailey Miller</a>
Level	verbal	Status Reason	Valid
Remarks	At least 5 times from Sept to Nov, 2010		

**Notes**

**"Reason":** Define a specific reason for the disciplinary measure here.

**"Employee":** Select which person receives the disciplinary measure.

**"Level":** The user may choose from several levels:

- **"verbal",**
- **"written"** or
- **"terminated"**.

**"Date":** The day when the disciplinary measure was given.



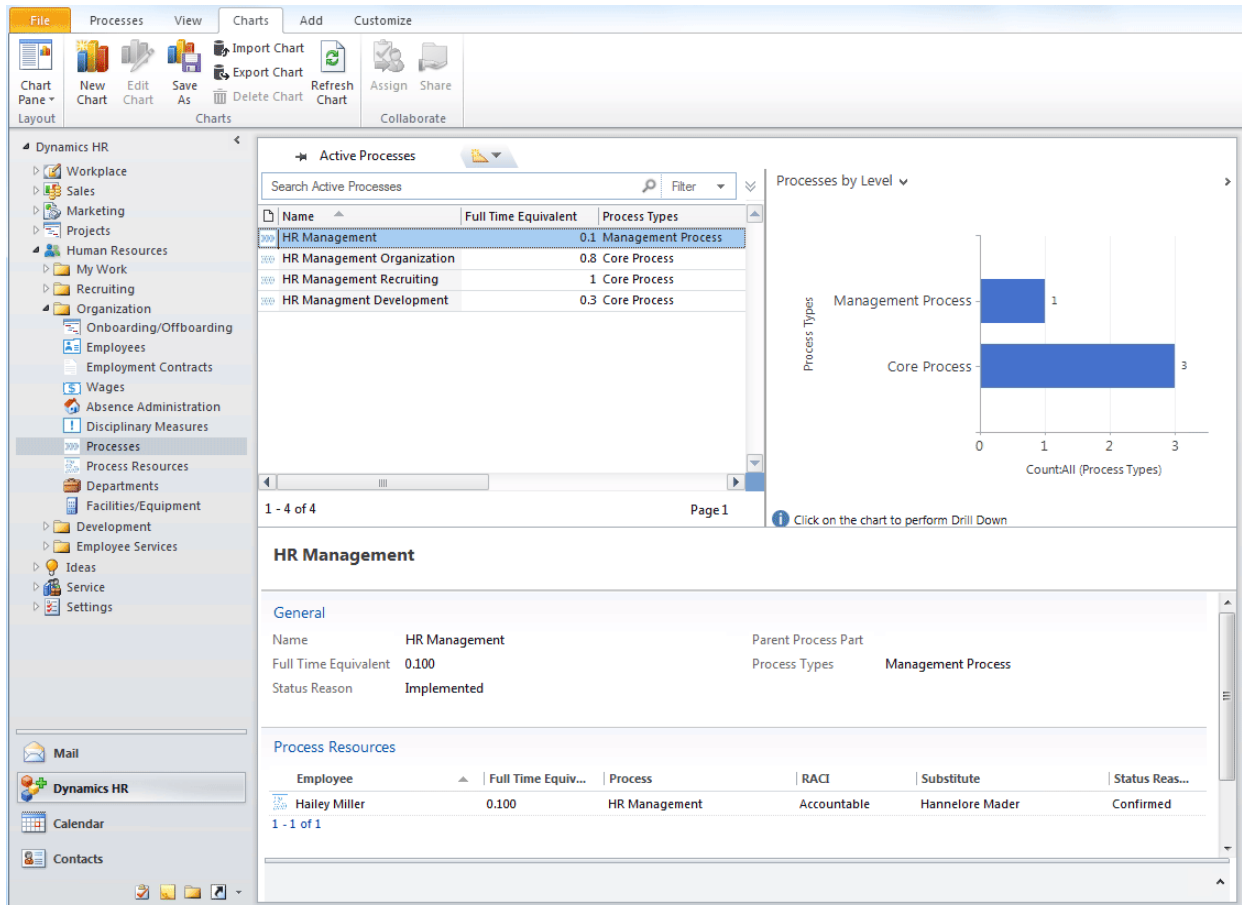
**"HR Representative":** HR Representative who is responsible for the disciplinary measure.

**"Status Reason":** The user can select a status reason for each measure. Here, he/she can choose between

- **"Draft",**
- **"In progress"** and
- **"Valid".**

**"Remarks":** Describe the reprimand in more detail or add any additional comments in this field.

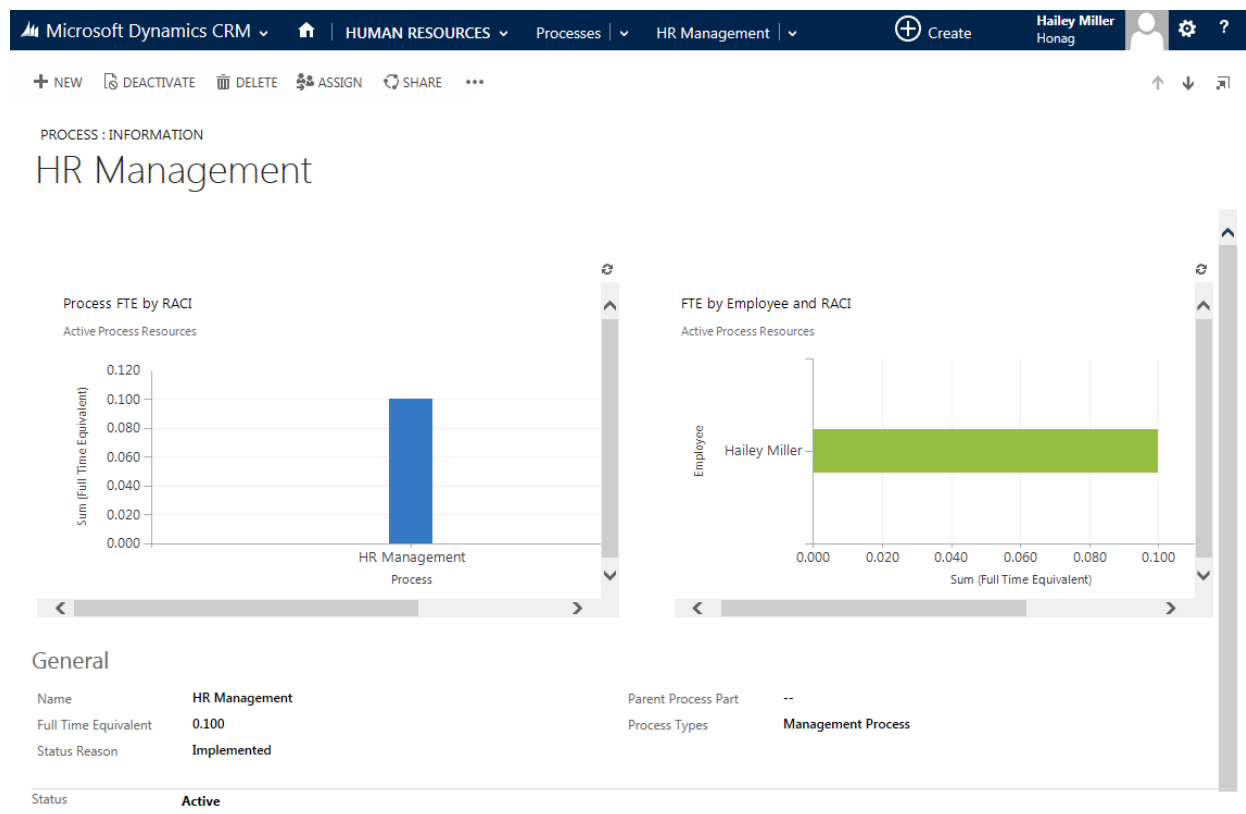
#### 4.2.8 Processes



As default chart, **"Process by Level"** is displayed in the Outlook start screen of this entity. A bar chart shows how many processes call a certain level.



#### 4.2.8.1 Main form



On top of the main form, two additional charts are shown:

The column chart **"Process FTE by RACI"** shows how many FTE are connected with which RACI level per process.

The bar chart **"FTE by Employee and RACI"** displays how many FTE are connected with which RACI level per employee.

Besides these charts, the following fields are on the form:

**"Name"**: Enter the name of the process.

**"Parent Process Part"**: If the process is attached to a parent process part, the user may select the parent here.

**"Full Time Equivalent"**: Enter how many full time equivalents (FTE) the process consists of.

**"Process Types"**: The user may select from the following process types:

- **"Management Process"**,
- **"Core Process"** or
- **"Supporting Process"**.

**"Status Reason"**: The user can select a status reason for each process. Here, he/she can choose between

- **"Draft"**,
- **"In Implementation"** and
- **"Implemented"**.

**"Process Resources"**: can be entered in the following sub-grid.

#### 4.2.8.2 Form "Process Resource"

As **"Process Resource"** is a separate entity, please see 4.2.9 for more information.

#### 4.2.8.3 Trigger

For each process, the user may use a trigger. The trigger can be found by clicking on **"..."** --> **"Other activities"** -> **"Trigger"** in the **"Process"** form. A trigger includes the following fields:

**"Subject"**: A subject is mandatory for each trigger. Besides, there is a text field so that more information can be provided.

**"Process"**: Here, the user may enter the respective process for the trigger. If the trigger is created from a **"Process"** record, this field is filled automatically with the content of the **"Regarding"** field.

**"Regarding"**: Here, the user may enter a regarding object for the trigger. If the trigger is created from a **"Process"** record, this field is filled automatically with the respective process.



**"Owner":** The owner of the trigger is shown here.

**"Scheduled Duration":** The duration can be selected of a pick-list.

**"Due Date":** A due date can also be chosen.

**"Priority":** The user may prioritize the trigger in term of

- **"Low",**
- **"Normal"** and
- **"High".**

Recruiting

MARK COMPLETEDELETECLOSE TRIGGERTO OPPORTUNITYTO CASE

TRIGGER : INFORMATION

Recruiting

General

Subject\*

Recruiting

Recruitment refers to the overall process of attracting, selecting and appointing suitable candidates for jobs within an organisation, either permanent or temporary. Recruitment can also refer to processes involved in choosing individuals for unpaid positions, such as voluntary roles or training programmes.

Recruitment may be undertaken in-house by managers, human resource generalists and/or recruitment specialists. Alternatively, parts of the process may be undertaken by either public-sector employment agencies, commercial recruitment agencies, or specialist search consultancies.

The use of internet-based services and computer technologies to support all aspects of recruitment activity and processes has become widespread.

Process

HR Management Recruiting

Regarding

HR Management

Owner\*

Hailey Miller

Scheduled Duration

0 minutes

Priority

Normal

Due Date

6/5/2011 2:00 AM

Notes

Activity Status

Open



## 4.2.9 Process Resources

**Active Process Resources**

Employee	Full Time Equivalent	Process	RACI
Edgar Casini	0.1	HR Management Development	Responsible
Ethan Carter	0.1	HR Management Development	Responsible
Hailey Miller	0.5	HR Management Recruiting	Responsible
Hailey Miller	0.1	HR Management Development	Accountable
Hailey Miller	0.4	HR Management Organization	Responsible
Hailey Miller	0.1	HR Management	Accountable
Hannelore Mader	0.2	HR Management Recruiting	Responsible
Hannelore Mader	0.2	HR Management Organization	Responsible

**FTE by Employee and RACI**

Sum (Full Time Equivalent)

Legend: Responsible (Green), Accountable (Red)

**Hailey Miller - HR Management Development - Accountable - 0.1**

**General**

Process	HR Management Development	RACI	Accountable
Employee	Hailey Miller	Full Time Equivalent	0.100
Substitute	Hannelore Mader		
Status Reason	Confirmed		

**Notes**

As default chart, **"FTE by Employee and RACI"** which was described above, is displayed in the Outlook start screen of this entity.

**PROCESS RESOURCE : INFORMATION**

**Hailey Miller - HR Management Development - Accountable - 0.1**

**General**

Process	HR Management Development	RACI	Accountable
Employee	Hailey Miller	Full Time Equivalent	0.100
Substitute	Hannelore Mader		
Status Reason	Confirmed		

**Notes**

**"Process":** The process which the resource is attached to can be selected here.

**"Employee":** Select the person which is the process resource, in this field.

**"Substitute":** If the chosen employee is not available, the here entered person is his/her substitute.

**"RACI":** RACI defines the responsibility of a resource for certain process tasks. Thus, the user may select whether the process resource is

- **"Responsible",**
- **"Accountable",**
- **"Consulted"** or
- **"Informed".**

**"Full Time Equivalent":** Here you can enter how much time, in terms of full time equivalent (FTE), the process resource is taking in the process.



**"Approved by":** Each process resource needs to be approved.

**"Status Reason":** The user can select a status reason for each process resource record. Here, he/she can choose between

- **"Draft",**
- **"In Implementation"** and
- **"Implemented".**

#### 4.2.10 Departments

The screenshot displays the Microsoft Dynamics HR interface. The left-hand navigation pane shows the 'Dynamics HR' menu with various options, including 'Departments' which is currently selected. The main window area is titled 'Active Business Units' and contains a table with the following data:

Name	Main Phone	Website	Parent Business
Honag Austria AG	+43 (222) 9399914-0	<a href="http://www.honag.at">http://www.honag.at</a>	Honag Europe
Honag Canada Central Corporation	+1 (613) 7641-000	<a href="http://www.honag.com">http://www.honag.com</a>	
Honag Deutschland Consulting	+49 (69) 784613-0	<a href="http://www.honag.de">http://www.honag.de</a>	Honag Deutschland GmbH
Honag Deutschland GmbH	+49 (69) 784613-0	<a href="http://www.honag.de">http://www.honag.de</a>	Honag Europe
Honag Deutschland Sales	+49 (69) 784613-0	<a href="http://www.honag.de">http://www.honag.de</a>	Honag Deutschland GmbH
Honag Deutschland Technics	+49 (69) 784613-0	<a href="http://www.honag.de">http://www.honag.de</a>	Honag Deutschland GmbH
Honag Europe	+49 (69) 784613-0	<a href="http://www.honag.com">http://www.honag.com</a>	Honag Canada Central Corporation
Honag France SA	+33 (1) 431645-0	<a href="http://www.honag.fr">http://www.honag.fr</a>	Honag Europe
Honag Hawaii Training Limited	+1 (808) 1734-000	<a href="http://www.honag.us">http://www.honag.us</a>	Honag Canada Central Corporation
Honag Italia SRL	+39 (06) 527664-000	<a href="http://www.honag.it">http://www.honag.it</a>	Honag Europe
Honag Nederland BV	+31 (20) 66454-0	<a href="http://www.honag.nl">http://www.honag.nl</a>	Honag Europe
Honag Schweiz Training AG	+41 (31) 471112-0	<a href="http://www.honag.ch">http://www.honag.ch</a>	Honag Europe
Honag US Consulting	+1 (212) 4337-000	<a href="http://www.honag.us">http://www.honag.us</a>	Honag US CRM International
Honag US CRM International	+1 (212) 4337-000	<a href="http://www.honag.us">http://www.honag.us</a>	Honag Canada Central Corporation
Honag US Sales	+1 (212) 4337-000	<a href="http://www.honag.us">http://www.honag.us</a>	Honag US CRM International
Honag US Technics	+1 (212) 4337-000	<a href="http://www.honag.us">http://www.honag.us</a>	Honag US CRM International

At the bottom of the table, it indicates '1 - 16 of 16 (0 selected)' and 'Page 1'.

For **"Departments"**, we use the Microsoft Dynamics standard entity **"Business Unit"**. This entity contains general information about a department, its address data and the corresponding project management fields.



File

Save and Close

Actions

Help

Business Unit: Honag Austria AG

Information

Business Unit : Information

General

Addresses

Project Management

Related

Organization

Common

Process Sessions

General

Addresses

Project Management

Name\*

Honag Austria AG

Main Phone

+43 (222) 9399914-0

Division

Other Phone

Parent Business\*

Honag Europe

Fax

Website

http://www.honag.at

Email

Bill To Address

Street 1

State/Province

Street 2

ZIP/Postal Code

Street 3

Country/Region

City

Ship To Address

Street 1

State/Province

Street 2

ZIP/Postal Code

Street 3

Country/Region

City

General

Business Unit Manager

Area

Type

Department-ID

Number of Employees

Settings

Show in Planning Table

☒ Yes ☐ No

Capacity [MD/Day]

5.00





## 4.2.11 Facilities/Equipment

File Home

New Activity New Record New Import Data Advanced Find Tools Help Employee Cockpit Fast Time Entry Projects

Local Facilities/Equipment

Search for records

New Add Connection Run Workflow... Start Dialog More Actions

Name	Business Unit
BMW company car	<a href="#">Honag US CRM International</a>
BMW Ethan Carter	Honag US CRM International
Notebook Ethan Carter	Honag US CRM International
Notebook Hailey Miller	Honag US CRM International

1 - 4 of 4 (1 selected) Page 1

Mail Dynamics HR Calendar



File Save and Close Actions Help

Facility/Equipment: BMW company car

**Information**

Facility/Equipment : Information

- General
- HR Management
- Project Management

**Related**

- Common**
  - Work Hours
  - Connections
  - Audit History
- Service**
  - Services
  - Resource Groups
- Process Sessions**
  - Background Processes
  - Real-time Processes

**General**

Name \* BMW company car Business Unit \* Honag US CRM International

Site New York - USA

Primary Email

Time Zone \* (GMT-05:00) Eastern Time (US & Canada)

Description

**"Name"**: Give a name to facilities/equipment here.

**"Business Unit"**: Here you can select the respective business unit or department to which a resource belongs.

**"Site"**: Select which site the facility/equipment is located. The site is the location of the respective business unit.

**"Primary E-Mail"**: Primary e-mail address of the selected business unit.

**"Time Zone"**: The user can select the time zone of the site where the facility/equipment is located.

**"Description"**: A detailed description of the resource and its usage can be entered here.

**"Expense per Unit"**: Here you can insert the budget per unit, when using the resource.

**"Currency"**: The expense currency per unit can be selected here.



### 4.3 Employee Development

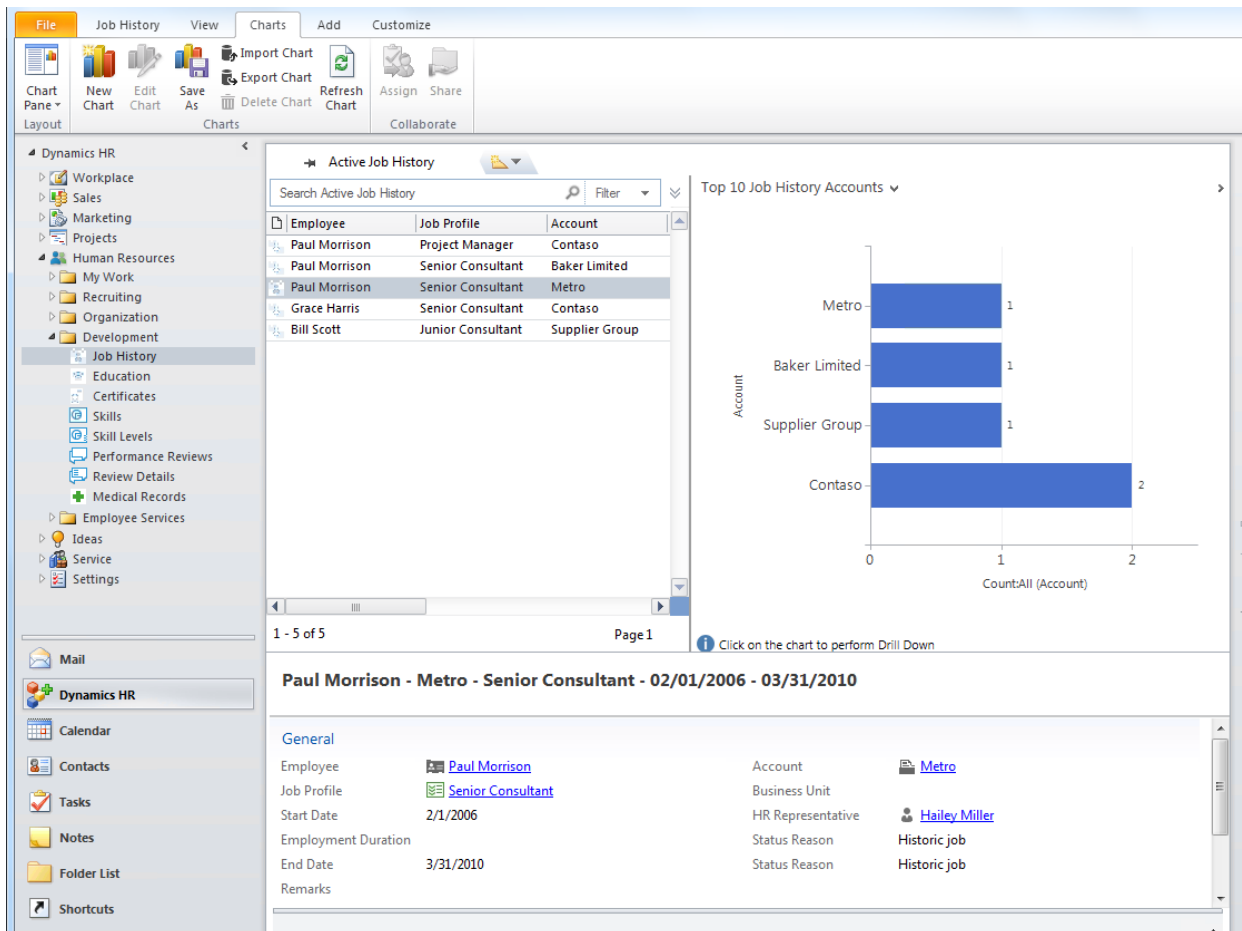
See individual employee and applicant job histories in the **"Development"** section.

Organize required skills and competences. In addition, you can track employee skill levels and development targets. When necessary, prior and future health checks can be listed.

**"xRM1 HR Management"** supports you by tracking performance review details, target achievements and future steps for improvement.

The educational background of applicants and employees can be listed. Organize employee certifications, including qualification levels and corresponding certificates.

#### 4.3.1 Job History



As default chart, **"Top 10 Job History Accounts"** is displayed in the Outlook start screen of this entity. A bar chart shows the accounts where most of the current employees worked before.

Microsoft Dynamics CRM | HUMAN RESOURCES | Job History | Paul Morrison - Met... | Create | Hailey Miller Honag

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

JOB HISTORY : INFORMATION

## Paul Morrison - Metro - Senior Consultant - 02/01/2006 - 03/31/2010

General

Employee	<a href="#">Paul Morrison</a>	Account	<a href="#">Metro</a>
Job Profile	<a href="#">Senior Consultant</a>	Business Unit	--
Start Date	2/1/2006	HR Representative	<a href="#">Hailey Miller</a>
Employment Duration	4 Years 1 Months	Status Reason	Historic job
End Date	3/31/2010	Status Reason	Historic job
Remarks	--		

Notes

**"Employee"**: Select which person the job history belongs to.



**"Job Profile":** The user can choose the applicable job profile here.

**"Start Date":** The day the previous job began.

**"Employment Duration":** The value in this field is calculated automatically. If the record shows an employee's current job, the field shows the difference between the current date and the start date. If the record shows an employee's previous job, the field shows the difference between the end date and the start date.

**"End Date":** The day the job ended.

**"Account":** If the job was in another company, select the respective account in this look-up field.

**"Business Unit":** If the position was internal, for a previous department, select the respective business unit from this look-up field.

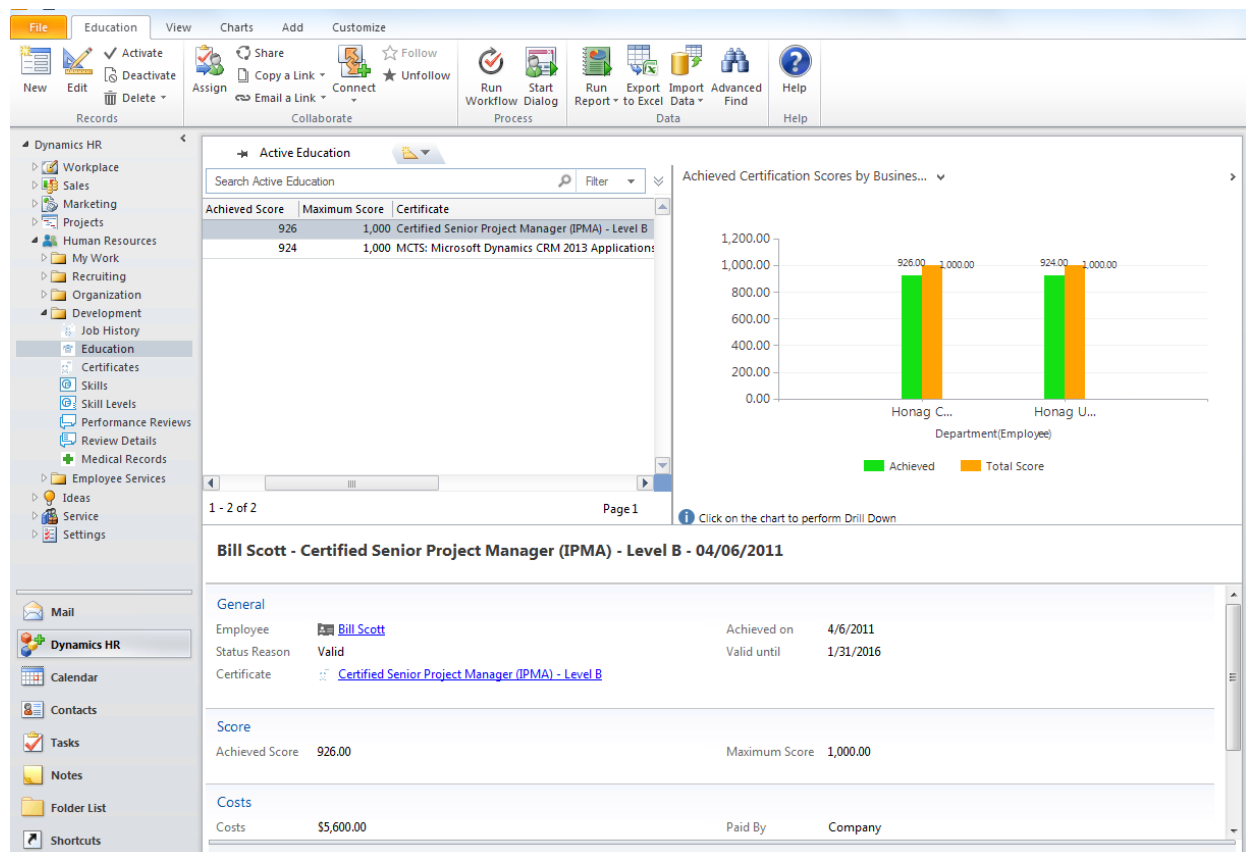
**"HR Representative":** The HR representative who is also the owner of the record.

**"Status Reason":** The user can select a status reason for each job history record. Here, he/she can choose between

- **"Historic job"** and
- **"Current job"**.

**"Remarks":** Describe the job in more detail or add any additional comments in this field.

#### 4.3.2 Education



As default chart, **"Achieved Certification Scores by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows per business unit, how many points of how many total points were achieved at in education exams and certificates.



Microsoft Dynamics CRM | HUMAN RESOURCES | Education | Paul Morrison - Cer... | Create | Hailey Miller Honag

NEW DEACTIVATE DELETE ASSIGN SHARE

EDUCATION : INFORMATION

## Paul Morrison - Certified Project Manager (IPMA) - Level C - 02/17/2010

General

Employee	<a href="#">Paul Morrison</a>	Achieved on	2/17/2010
Status Reason	Valid	Valid until	2/16/2013
Certificate	<a href="#">Certified Project Manager (IPMA) - Level C</a>		

Score

Achieved Score	--	Maximum Score	--
----------------	----	---------------	----

Costs

Costs	\$2,900.00	Paid By	Company
Currency	<a href="#">US Dollar</a>		

**"Employee"**: Select which person the further education applies to.

**"Date of Certification"**: The day when the employee received the certification.

**"Certificate"**: Select which certificate was received.

**"Achieved on"**: Enter the date when the education was completed successfully.

**"Valid until"**: Enter the date until when the education/certificate is valid.

**"Achieved Score"**: If applicable, the user can enter the employee's certification score.

**"Maximum Score"**: If the certification test included a maximum score, it is shown here. This field is write protected; the maximum score is filed in the **"Certificate"** form. Please see chapter 4.3.3 for further details.

**"Costs"**: Here, the user can enter how much the certification cost.

**"Paid by"**: Select if the payment was covered by:

- **"Employee"** or
- **"Company"**.

**"Currency"**: Select the payment currency used for the certification.

### 4.3.3 Certificates

File Certificates View Charts Add Customize

Chart Pane New Chart Edit Chart Save As Export Chart Refresh Chart Assign Share Collaborate

Dynamics HR

- Workplace
- Sales
- Marketing
- Projects
- Human Resources
  - My Work
  - Recruiting
  - Organization
  - Development
  - Job History
  - Education
  - Certificates**
  - Skills
  - Skill Levels
  - Performance Reviews
  - Review Details
  - Medical Records
- Employee Services
- Ideas
- Service

Mail

Dynamics HR

- Calendar
- Contacts
- Tasks
- Notes
- Folder List
- Shortcuts

Active Certificates

Name	ID	Maximum Score	Type	Status Reason
Cambridge Certificate in Advanced English	CAE	500	Language Certificate	Current Version
Cambridge Certificate of Proficiency in English	CPE	500	Language Certificate	Current Version
Certified Project Director (IPMA) - Level A	IPMA A	1,000	Professional Certificate	Current Version
Certified Project Management Associate (IPMA) - Level D	IPMA D	1,000	Professional Certificate	Current Version
Certified Project Manager (IPMA) - Level C	IPMA C	1,000	Professional Certificate	Current Version
Certified Senior Project Manager (IPMA) - Level B	IPMA B	1,000	Professional Certificate	Current Version
MCTS: Managing Microsoft Dynamics Implementations...	MCTS 3	1,000	Professional Certificate	Current Version
MCTS: Microsoft Dynamics CRM 2011 Customization an...	MCTS 2	1,000	Professional Certificate	Current Version
MCTS: Microsoft Dynamics CRM 2013 Applications	MCTS 1	1,000	Professional Certificate	Current Version
Organization Development and Change	BUS ADM...	100	Soft Skill Certificate	Current Version

1 - 10 of 10 Page 1

Click on the chart to perform Drill Down

Certificates by Type

Professional Certificate Language Certificate Soft Skill Certificate

Cambridge Certificate in Advanced English

General

Name	Cambridge Certificate in Advanced English	Maximum Score	500.00
ID	CAE	HR Representative	<a href="#">Hailey Miller</a>
Type	Language Certificate	Status Reason	Current Version

Notes

There are no Notes for this Certificate.



As default chart, "**Certificates by type**" is displayed in the Outlook start screen of this entity. A pie chart shows how many certificates call a certain type.



+ NEW DEACTIVATE DELETE ASSIGN SHARE ...

CERTIFICATE : INFORMATION

## Cambridge Certificate in Advanced English

### General

Name	Cambridge Certificate in Advanced English	Maximum Score	500.00
ID	CAE	HR Representative *	Hailey Miller
Type	Language Certificate	Status Reason	Current Version

**"Name"**: Enter which specific certificate is described.

**"ID"**: If the certificate has an ID number, it can be entered in this field.

**"Type"**: Select between the following certificate types:

- **"Professional Certificate"**,
- **"Language Certificate"**,
- **"Soft Skill Certificate"** or
- **"Other Certificate"**.

**"Maximum Score"**: If the certification test included a maximum score, the user can enter it here.

**"HR Representative"**: The HR representative is the owner of the record.

**"Status Reason"**: The user can select a status reason for each certificate. Here, he/she can choose between

- **"Draft"** and
- **"Current Version"**.



#### 4.3.4 Skills

Type	Name	Categories
Language Skill	English	
Professional Skill	Project Management	
Professional Skill	Sales	

1 - 3 of 3 Page 1

### Project Management

**General**

Name: Project Management  
Type: Professional Skill  
Description: --

Owner: [Hailey Miller](#)

**Notes**

There are no Notes for this Skill.

As default chart, **"Skills by type"** is displayed in the Outlook start screen of this entity. A pie chart shows how many skills call a certain type.

Microsoft Dynamics CRM Project Management | Hailey Miller Honag

+ NEW DEACTIVATE DELETE ASSIGN SHARE ...

SKILL : INFORMATION

## Project Management

### General

Name: Project Management Owner: [Hailey Miller](#)

Type: Professional Skill

Description: --

### Notes

NOTES

Enter a note

No Notes found.

Status: Active

**"Name"**: Name of the skill.

**"Type"**: Select between the following skill types:

- **"Professional Skill"**,
- **"Language Skill"**,
- **"Soft Skill"** or
- **"Other Skill"**.



**"Description":** Enter detailed description of the skill here.

**"HR Representative":** The HR representative is the owner of the record.

### 4.3.5 Skill Levels

Skill	Type (Skill)	Employee	Required
English	Language Skill	Catherine McGrath	4
English	Language Skill	David Day	4
English	Language Skill	David Day	4
English	Language Skill	David Day	4
Project Management	Professional Skill	David Day	3
Project Management	Professional Skill	David Day	3
Sales	Professional Skill	Catherine McGrath	5
Sales	Professional Skill	David Day	3
Vertrieb	Professional Skill	David Day	3
Vertrieb	Professional Skill	David Day	5

**Skill Gap**

Skill	Count:All (Required)	Count:Non-empty (Actual)
Vertrieb	2	0
Sales	2	2
Project Management	2	1
English	4	2

**English - Catherine McGrath**

**General**

Skill: [English](#) Employee: [Catherine McGrath](#)

HR Representative: [Hailey Miller](#) Job Profile:

Status Reason: [Current Level](#)

**Experience Rating**

Required	Actual
4	4

**Notes**

There are no Notes for this Skill Level.

As default chart, **"Skill Gap"** is displayed in the Outlook start screen of this entity. A bar chart shows if values were set for **"Required"** and **"Actual"** levels of a skill.

**Microsoft Dynamics CRM** English - David Day |

**Hailey Miller**  
Honag

**SKILL LEVEL : INFORMATION**

## English - David Day

**General**

Skill: [English](#) Employee: [David Day](#)

HR Representative\*: [Hailey Miller](#)

Status Reason: [Current Level](#)

**Experience Rating**

Required	Actual
4	4

**"Skill":** Select the skill corresponding to this record here.

**"Employee":** If the skill level is set for an employee, it can be selected here.

**"Job Profile":** If the skill level is set for a job profile, it can be selected here.

**"HR Representative":** The HR representative is the owner of the record.

**"Status Reason":** Select the status reason for each skill level record:





- **"Current Level",**
- **"To be evaluated"** or
- **"To be confirmed".**

**"Required"**: Enter a value for the required skill level here. The user has the choice between "0" (worst) and "5" (best).

**"Actual"**: Enter a value for the actual skill level here. The user has the choice between "0" (worst) and "5" (best).

#### 4.3.6 Performance Reviews

**Active Performance Reviews**

Date	Employee	Manager	Valid until	Next Rev
5/2/2010	Hailey Miller	Ethan Carter	5/1/2011	5/2/2011
4/1/2011	Paul Morrison	Ethan Carter	3/31/2011	4/1/2012

Target Achievement (all employee...)

Year (Date)	NO / "	PARTL...	YES
2011	50	50	0
2012	0	0	100

**Paul Morrison - 04/01/2011**

**General**

Employee: [Paul Morrison](#)  
 Date: 4/1/2011  
 Valid until: 3/31/2011  
 Manager: [Ethan Carter](#)  
 Next Review: 4/1/2012  
 Status Reason: Planned

**Review Details**

Name	Type	Certificate	Employee	Required Com...	Com...	Status Re...
Manage projects successfully	Evaluation		Paul Morrison	3/31/2011	Yes	Valid
Improve System Integration Competen...	Target		Paul Morrison	9/30/2011	Partially	Valid
Achieve Project Management Compete...	Target	Certified Project Director (IPMA) - Level A	Paul Morrison	11/30/2011	No	Valid

As default chart, **"Overdue Performance Review by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows how many performance reviews for employees are overdue, sorted by business unit.

##### 4.3.6.1 Main form

Microsoft Dynamics CRM | HUMAN RESOURCES | Performance Reviews | Paul Morrison - 04/... | Create | Hailey Miller Honag

PERFORMANCE REVIEW : INFORMATION

**Paul Morrison - 04/01/2011**

**General**

Employee: [Paul Morrison](#)  
 Date: 4/1/2011  
 Valid until: 3/31/2011  
 Manager: [Ethan Carter](#)  
 Next Review: 4/1/2012  
 Status Reason: Planned

**Review Details**

Name	Type	Certificate	Employee	Required Completion Dat...	Completed...	Status Reason
Manage projects successfully	Evaluation		Paul Morrison	3/31/2011	Yes	Valid
Improve System Integration Competences	Target		Paul Morrison	9/30/2011	Partially	Valid
Achieve Project Management Competences	Target	Certified Project Director (IPMA) - Level A	Paul Morrison	11/30/2011	No	Valid

**"Employee"**: Select which person the performance review is for.

**"Manager"**: The manager who conducted the employee review.

**"Date"**: The day when review took place.



**"Next Review"**: The day when the next review is scheduled to take place.

**"Valid until"**: Enter the date until when the performance review is valid.

**"Status Reason"**: Select the status reason for each performance review:

- **"Planned"**,
- **"In Progress"** or
- **"Valid"**.

#### 4.3.6.2 Form "Review Detail"

As **"Review Detail"** is a separate entity, please see chapter 4.3.7 for details.

### 4.3.7 Review Details

Name	Type
Manage projects successfully	Evaluation
Reorganize personell files	Target
Improve System Integration Competences	Target
Achieve Project Management Competences	Target

Business Unit	NO / "	PAR...	YES
Honag ...	50	50	0
Honag ...	0	100	0

Details	
Name	Manage projects successfully
Type	Evaluation
Certificate	
Employee	Paul Morrison
Status Reason	Valid
Required Completion... 3/31/2011	
Performance Review Paul Morrison - 04/01/2011	
Corresponding Wage	
Completion	
Completed	Yes
Completed On	3/31/2011
Manager	Ethan Carter

As default chart, **"Target Achievement by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.



#### 4.3.7.1 Main form

Microsoft Dynamics CRM Manage projects su... | v Hailey Miller Honag ?

+ NEW DEACTIVATE DELETE ASSIGN SHARE ...

REVIEW DETAIL : INFORMATION

## Manage projects successfully

### General

#### Details

Name	Manage projects successfully		
Type	Evaluation	Required Completion	3/31/2011
Certificate	--	Performance Review	<a href="#">Paul Morrison - 04/01/2011</a>
Employee	<a href="#">Paul Morrison</a>	Corresponding Wage	--
Status Reason	Valid		

#### Completion

Completed	Yes	Degree [%]	100.00
Completed On	3/31/2011	Manager	<a href="#">Ethan Carter</a>

**"Name"**: Enter here, which specific review detail is described.

**"Type"**: The user can choose from the following review detail types:

- **"Target"** or
- **"Evaluation"**.

**"Certificate"**: If the review detail includes some form of certificate, it can be chosen here.

**"Employee"**: Select which person the review detail belongs to.

**"Status Reason"**: Select the status reason for each skill level record:

- **"Draft"**,
- **"Agreed"**,
- **"In Progress"** or
- **"Valid"**.

**"Required Completion Date"**: Enter here when the review details is supposed to be completed.

**"Performance Review"**: The performance review which the review detail is connected to can be chosen here.

**"Corresponding wage"**: If the review detail is connected to a certain wage, it can be selected here.

**"Completed"**: The user can select whether or not the review detail was accomplished. They can either select:

- **"Yes"**,
- **"Partially"** or
- **"No"**.

**"Degree [%]"**: If **"Partially"** was selected in the **"Completed"** field, the user may enter the degree of completion here. If **"Yes"** or **"No"** was selected, the field is write-protected and automatically filled with **"0.00"** (Yes) or **"100.00"** (No).

**"Completed On"**: The day when the review detail was completed.

**"Manager"**: The manager who confirms that the review detail was completed.

#### 4.3.7.2 Form "Skill Levels"

Please see chapter 4.3.5 for details.



### 4.3.8 Medical Records

Name	Employee	Last Exam	Next Exam	Category
Medical record for office staff	Paul Morrison	4/1/2011	4/2/2012	
Medical record for office staff	William Jones	4/1/2010	3/31/2011	
Medical record for office staff	Daniel Brown	3/12/2011	3/12/2012	
Medical record for office staff	Ethan Carter	3/3/2011	3/3/2012	
Medical record for office staff	Hailey Miller	3/15/2011	3/15/2012	
Medical record for office staff	Robert Bonderman	3/9/2011	3/9/2012	
Medical record for office staff	Tom Seel	3/11/2011	3/11/2012	

**Overdue Medical Records by Business Unit**

Business Unit	Overdue Health Checks
Honag Haw... Department(Employee)	1

**Medical record for office staff**

**General**

Name: Medical record for office staff  
 Employee: Paul Morrison  
 HR Representative: Hailey Miller

**Examination**

Last Exam: 4/1/2011  
 Next Exam: 4/2/2012

As default chart, **"Overdue Medical Records by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows how many medical records for employees are overdue, sorted by business unit.

**Microsoft Dynamics CRM** Medical record for... | Hailey Miller Honag

**MEDICAL RECORD : INFORMATION**

## Medical record for office staff

**General**

Name \* Medical record for office staff  
 Employee Paul Morrison  
 HR Representative \* Hailey Miller

**Examination**

Last Exam 4/1/2011  
 Next Exam 4/2/2012

**"Name"**: Enter here, which specific health check is described.

**"Employee"**: Select which person received the health check.

**"HR Representative"**: The HR representative is the owner of the record.

**"Last Exam"**: The day when the last health check took place.

**"Next Exam"**: The day when the next health check is scheduled to take place.



## 4.4 Employee Services

For a more convenient working, we've added the "Employee Cockpit" and the "Fast Time Entry" to the **"Employee Services"** section of **"xRM1 HR Management"**.

This section also makes it easy for you to organize employee absences. Submitted absences will be directly taken into account when availability is being calculated in **"CRM-Project"**.

**"xRM1 HR Management"** is fully integrated in Microsoft Dynamics activity management.

Manage employees travel and related expenses. You can submit and track all kinds of expenses; receipts can be added to track individual costs.

### 4.4.1 Absences

The screenshot displays the Microsoft Dynamics HR interface for the 'Absences' entity. The left sidebar shows the navigation pane with 'Absences' selected under 'Employee Services'. The main area is divided into several sections:

- My Absences:** A table listing absences for Hailey Miller. The table has columns: Name, Reason for Absence, Owner, From, and Until.
- Absences per Month:** A bar chart showing the number of days absent per month. The Y-axis ranges from 0.00 to 3.50. The X-axis shows 'Jun 2011' with a value of 3.00 and 'Jun 2012' with a value of 0.00.
- Leave - Hailey Miller:** A detailed view of a specific absence. It includes fields for 'Applicant\_Delegate' (Hailey Miller), 'Substitute' (Patricia Anderson), 'General' information (From: 6/12/2011 12:00 AM, Until: 6/14/2011 11:59 PM, Days: 3.00, Reason for Absence: Leave, Remaining days of leave: 9.00), 'Activities for Leave' (There are no Notes for this Absence.), and 'Status of Processing' (Name: Leave - Hailey Miller, Created On: 6/2/2011 4:02 PM, Status Reason: No Substitute found, Role: Employee).

As default chart, **"Absences per month"** is displayed in the Outlook start screen of this entity. A column chart shows how many employees (in terms of days) are/were absent in which month.

#### 4.4.1.1 General description

This menu option provides you direct access to the absence administration of each individual employee. Here you can create requests for leave as well as compensatory time-off.



SAVE SAVE & CLOSE + NEW EDIT PROCESS FORM EDITOR

ABSENCE : INFORMATION

## New Absence

Submitting Of Absence > Substitute Confirmation > Supervisor Approval > HR Departmental Approval > Leave Preparation > Return Follow-Up > Next Stage

### General

Applicant & Delegate		Activities for Leave	Status of Processing
Hailey Miller Substitute <input type="text"/>		NOTES No records found.	Name -- Created On -- Status Reason -- Created Role -- Employee
<b>General</b> From* -- Until 6/2/2011 11:59 PM Days* -- Reason for Absence* Leave Remaining days of leave* 9.00		<b>Description</b> --	
Status Reason		Created	

Requests for leave are used to schedule employee absences. Compensational time-off is credited as "compensation days" to an employee's holiday entitlement. Compensational leave can occur for the following reasons, for example:

- When an employee has cut a vacation short (for work reasons),
- A vacation that has been approved cannot be taken for operational reasons or
- The employee has accumulated a certain amount of overtime which is being given back to them in vacation days.

Requests for leave and compensational time-off are supported through a multi-layer approval process, using Microsoft Dynamics workflows and activities. These workflows can be configured to the rules of your organization, in the Processes area of Microsoft Dynamics settings. In the standard configuration, the following major process steps are included, in particular:

- Substitute selection when creating a request,
- Substitution process whereby the user selected approves/accepts their role as substitute,
- Supervisor (manager) vacation approval,
- HR approval and vacation system entry.

After the vacation substitute has been confirmed, approved by superior/manager and by HR, the vacation days are automatically deducted from the employee's remaining days of leave, or added, in the case of compensational time-off.

Employees responsible for certain roles, such as "Manager" and "Head of HR", are defined in the user settings.

**Note:** When you're requesting leave for less than a day, the time away from work must be entered. For example: for a standard 8:00am to 4:00pm (16:00) work day, a half vacation day (in the morning) will be entered as 8:00am to 12:00pm.

#### 4.4.1.2 Business Process Flow

ABSENCE : INFORMATION

## New Absence

Submitting Of Absence (Active) > Substitute Confirmation > Supervisor Approval > HR Departmental Approval > Leave Preparation > Return Follow-Up > Next Stage

From*	click to enter	Days*	click to enter
✓ Until*	6/2/2011 11:59 PM		
Substitute*	click to enter		

A default business process flow for absences was created. It includes the following stages and fields:

#### "Submitting of Absence"

- "From",
- "Until",
- "Substitute",
- "Days" and
- "Reason for Absence".



**"Substitute Confirmation":**

- **"Substitution confirmed".**

**"Superior Approval":**

- **"Request approved".**

**"HR Departmental Approval":**

- **"Request approved".**

**"Leave Preparation":**

- **"Preparation completed".**

**"Return Follow-up":**

- **"Follow-up completed".**

**Note:** Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.

## 4.4.2 Travels

**Active Travels**

Title	Owner	Account
ABK CRM Einführung Frankfurt - ABK Unternehmensber...	Peter Maurer	ABK Unternehme...
ABK Reise	Peter Maurer	ABK Unternehme...
DB Sub CRM Concept - Baker Limited - 08.06.2011 - 08.0...	Daniel Brown	Baker Limited
iOne CRM Implementation New York - iOne corporation...	Paul Morrison	iOne Corporation
PS CRM TP Konzeption - Beratungs AG - Frankfurt - 08.0...	Peter Schneider	Beratungs Infor...

**Travels by Business Unit**

Business Unit(Owner)	CountAll (Travel)
Honag US Consulting	1
Honag Schweiz Training AG	1
Honag Hawaii Training Limited	1
Honag Deutschland Consulting	2

**iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011**

**General**

Title: iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011

Account: [iOne Corporation](#)

Owner: [Paul Morrison](#)

Travel From: 5/2/2011 6:00 PM

Travel Until: 5/3/2011 9:00 PM

Project: [iOne CRM Implementation New York](#)

Travel Number: TRV0004

Department:

**Address**

Destination: Customer Address

Street: Fifth Avenue and 57th Street

ZIP/Postal Code: NY 10022

City: New York

**Costs**

Travel Times (MD): 0.00000

Travel Costs: \$0.00

Receipt Costs: \$0.00

As default chart, **"Travels by Business Unit"** is displayed in the Outlook start screen of this entity. A bar chart shows the amount of travels, sorted by business unit.



Microsoft Dynamics CRM iOne CRM Impleme... | Hailey Miller Honag

+ NEW DEACTIVATE DELETE ASSIGN SHARE ...

TRAVEL : INFORMATION

## iOne CRM Implementation New York - iOne corporation Inc. - New York...

### General

**General**

Title	iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011		Project	iOne CRM Implementation New York
Account	iOne Corporation	Travel From	5/2/2011 6:00 PM	Travel Num: TRV0004
Owner	Paul Morrison	Travel Unit	5/3/2011 9:00 PM	Department --

### Address

Destination Customer Address

### Costs

Travel Times (M)	0.00000	Travel Costs	\$0.00	Receipt Costs	\$0.00
------------------	---------	--------------	--------	---------------	--------

### Billing

Billable	--	Currency	US Dollar	Timesheet	--	Cleared Amount	--
----------	----	----------	-----------	-----------	----	----------------	----

### Description & Notes

--

**NOTES**

Enter a note

No Notes found.

Status Reason	Processing	Billed	No
---------------	------------	--------	----

New travel can be created within the Microsoft Dynamics menu or within a project node. When creating a travel within a project node, the **"Project"** field is automatically prefilled by the system.

- The **"Title"** is automatically filled in and contains the project name, destination and travel period.
- "Owner"** is the employee taking the business trip. This is filled in with the current user.
- The **"Account"** field specifies which customer will be visited on the trip and is automatically filled in with the account from the respective project.
- "Department"** is available if more detail is needed.
- The **"Travel Number"** is used as a unique identifier for the trip and associated receipts.
- "Project"** shows the relevant project.
- "Travel From"** and **"Travel Until"** is used to specify the time period of the entire trip.
- "Primary customer address"** or **"Different address"** specifies whether the destination is the customer address or a different address (such as a construction site or a regional office). When a different address is needed, additional fields are displayed to specify **"Street"**, **"ZIP code"**, **"Town/City"** and **"Additional address"**.

The fields in the **"Costs"** area are automatically filled in by the system, as soon as receipts or times are entered for the trip.

The tab on the left-hand side of the travel screen (as in the project) allows the user to create activities as well as view all completed activities. The activities stored here, are seen as 'travel times', as they are assigned to a trip. Therefore, the specific arrival and departure of an appointment should be assigned to the trip and not to the project. Conversely, specific service appointments related to a project should not be associated with the trip but with the relevant project (e.g. **"Appointment"** or **"Service Activity"**). When creating these activities, use the **"Associated Travel"** field (under the Travel Management tab) to specify the travel associated with the appointment. The **"Regarding Appointment"** and **"Regarding Service Activity"** menu options allow you to view travel appointments and service activities. Solution settings can be used to plan travel activities (arrival, departure, preparations, and bookings, etc.) as well as times and costs. You can decide if travel times and expenses are tallied just for the trip, or are passed on to the project.

Receipts are totaled in the trip in the **"Costs"** field, as soon as the receipt is closed. These costs are always passed on to the costs of the project.

**Note:** Functionalities marked with an \* are only available in combination with **"CRM-Project"** or an **"xRM1 HR Manager"** License.





### 4.4.3 Receipts

The screenshot displays the 'Active Receipts' section of the xRM1 HR Management application. On the left is a navigation pane with various folders like 'Inbox', 'Drafts', and 'Receipts'. The main area shows a table of receipts with columns: Title, Means of Payment, Paid By, and Type of the receipt document. A pie chart on the right, titled 'Receipts by Billability', shows the distribution of receipts by billability status (Yes/No). Below the table, a detailed view for the receipt 'iOne CRM review Overnight Stay 03.05.2011' is shown, including fields for General, Details, and Vehicle information.

Title	Means of Payment	Paid By	Type of the receipt document
DB Sub CRM Concept - Baker Limited - 08.06.2011 - 08.0...	Cash or Private	Employee	Expenses
DB Sub CRM Concept - Baker Limited - 08.06.2011 - 08.0...	Visa	Company	Public Transport
iOne CRM review Overnight Stay 03.05.2011	Visa	Company	Overnight Stay
iOne CRM review Rental Car 02.05.2011	Visa	Company	Rental Car
Printing paper	Cash or Private	Employee	Office Supplies

**Receipts by Billability**

Pie chart showing the distribution of receipts by billability status:

- Yes: \$370.00
- No: \$40.00

**iOne CRM review Overnight Stay 03.05.2011**

**General**

Title: iOne CRM review Overnight Stay 03.05.2011  
Travel: [iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011](#)

**Details**

Project: [iOne CRM Implementation New York](#)  
Owner: [Paul Morrison](#)  
Travel Day: 5/3/2011  
Receipt Number: VOU0008  
Date of Receipt: 5/3/2011  
Type of the receipt document: Overnight Stay  
Paid By: Company  
Type of Payment: Visa

**Vehicle**

Car  
Mileage Allowance (Internal Rate)  
Mileage at Departure  
Mileage at the end of travel  
Mileage Covered

As default chart, **"Receipts by billability"** is displayed in the Outlook start screen of this entity. A pie chart shows the total value of receipts, sorted by billability.

In the standard, receipts are always associated with travel. However, you can also create receipts without travel. There are various receipt types within the **Type of receipt document** field to choose from:

- Entertainment expenses
- Office supplies
- Bus/train
- Company car
- Flight
- Gifts
- Fuel
- Rental car
- Parking fees
- Private
- Other receipt document types
- Private vehicle
- Other car expenses
- Expenses
- Taxi
- Telephone
- Overnight stay

Various fields for entering receipt information are displayed at different times depending on the receipt type.

Relevant net costs are used for travel/project costs. For the **"Company Car"** receipt type, standard system costs are taken from the resource (e.g. Car) once the travel distance has been entered.



Microsoft Dynamics CRM | PROJECTS | Receipts | iOne CRM review Overnight Stay 03.05.2011 | Create | Hailey Miller Honag

NEW DEACTIVATE DELETE ASSIGN SHARE

RECEIPT : INFORMATION

## iOne CRM review Overnight Stay 03.05.2011

### General

**General**

Title: iOne CRM review Overnight Stay 03.05.2011

Travel: [iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011](#)

Project: [iOne CRM Implementation New York](#) Receipt Num: VOU0008 Type of the: Overnight Stay

Owner: Paul Morrison Date of Re: 5/3/2011 Paid By: Company

Travel Day: 5/3/2011 Type of Paym: Visa

**Vehicle**

Mileage at t: -- Mileage at ti: --

**Cost**

Gross Amou	\$220.00	Deductible t	\$20.00	Net Amount	\$200.00
------------	----------	--------------	---------	------------	----------

**Billing**

Billable: -- Is Billed: No Currency: US Dollar

Timeshee: -- Cleared A: --

Status Reason: Processing

To create a new receipt, simply follow the steps below:

- A receipt for a particular trip is assigned with the **"Travel"** field. When creating a travel receipt, the value is automatically taken from the trip. This also applies to the **"Project"** field.
- "Type of receipt document"** provides you with a variety of field options. For example, selecting **"Company Car"** hides the **"Costs"** field from view; fields for selecting a vehicle and specifying the miles driven are displayed. Selecting **"Expenses"** reveals a tab which is linked to an (internet) expenses calculator.
- "Receipt number"** is filled in automatically.
- Select **"Type of payment"** (not available for every receipt).
- Select **"Method of payment"** (not available for every receipt).
- Select **"Travel day"**.
- Select **"Receipt day"**.
- Select **"Gross Amount"**.
- Select **"Deductible taxes"**.
- "Net Amount"** is calculated automatically.
- Select **"Vehicle"** if receipt type **"Company Car"** is selected.
- For receipt type **"Company Car"**: The mileage is calculated automatically from the travel beginning and end. The calculated value can be overwritten.
- The **"Description"** field allows you to add additional information, for any further clarification.
- The **"Expenses calculator"** tab is only available when **"Expenses"** is selected as the receipt type.

Receipts are bound to the travel once deactivated.

**Note:** For most receipts, the **Net Amount** field is used as the starting field for calculating cost. However, the company car is an exception. Costs for the company car are taken from **"Costs per unit"** in the facility/equipment selected and multiplied by the value in the **"Distance traveled"** field.

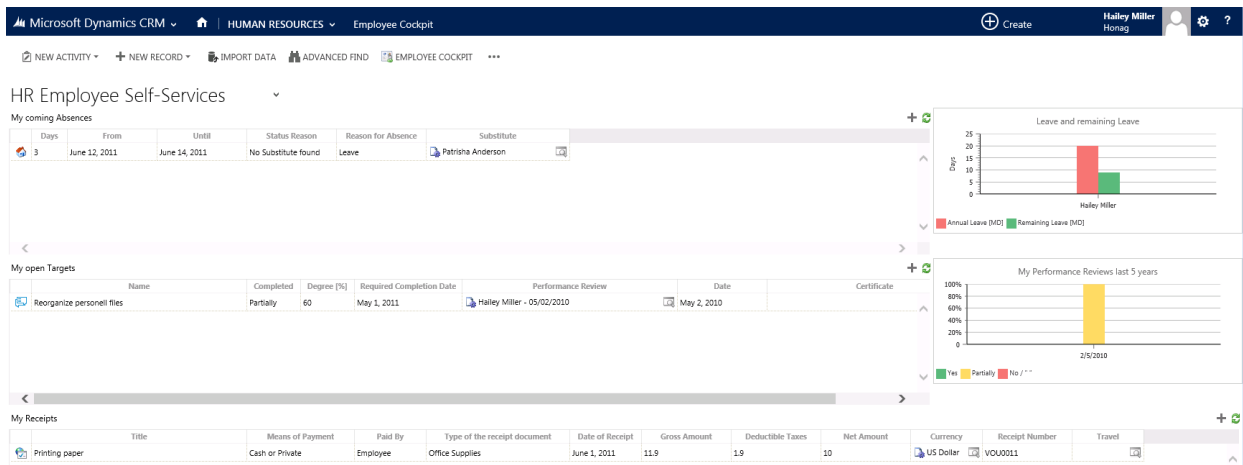
**Tip:** Alternatively, receipts can also be entered centrally (e.g. by the back office). To do this, display the receipts at the required places within the pane. This enables those responsible to enter all receipts, and to directly assign those employees in question, such as for further classification or assignment to travel or a project.

#### 4.4.4 Employee Cockpit

For the time entry functionalities of the Employee Cockpit, please see chapter 5.2.



Besides these time entry functionalities, the Employee Cockpit offers several views and charts for employees to get an overview about their performance reviews and targets, absences and personal receipts. In order to use them, please use the view **"Employee Self-Services"** in the dropdown section.



**"My coming Absences"**: Overview of the employee's coming leaves.

**"Leave vs. Remaining Leave"**: This column chart compares the annual to the remaining leave entitlement.

**"My open Targets"**: Overview of the employee's open targets which were agreed in performance reviews.

**"My Performance Reviews last 5 years"**: This column chart shows how many percent of the employee's targets have been completed (totally or partially) or not in the last five years.

**"My Receipts"**: Overview of the employee's personal receipts.

#### 4.4.5 Fast Time Entry

Date	Start Time	End Time	Work [h]	Type	Regarding	Subject
5/30/2011	11:00 AM	7:30 PM	8.5	Account	Honag Inc	Workshop about Labor Law
-			8.5			
5/31/2011	11:00 AM	6:00 PM	7	Account	Honag Inc	Workshop about Labor Law
-			7			
6/1/2011	10:30 AM	2:00 PM	3.5	Account	Honag Inc	Prepare wages
6/1/2011	3:00 PM	6:00 PM	3	Account	Honag Inc	Check Time Tracking
-			6.5			

Please see chapter 5.1 for details.





## 5.2 Entering Time with the Employee Cockpit mask

With the user friendly and flexible Employee Cockpit mask, you can enter and edit your work hours quickly and easily. It can be accessed in almost all areas of Microsoft Dynamics, from the menu bar. The Employee Cockpit mask can also be used from outside Microsoft Dynamics (integrated into your intranet page, Outlook start page, SharePoint site etc.)

The screenshot shows the 'Employee Cockpit' mask in Microsoft Dynamics. The top navigation bar includes buttons for REVIEW DETAILS, MEDICAL RECORDS, ABSENCES, TRAVELS, RECEIPTS, EMPLOYEE COCKPIT (highlighted), and FAST TIME ENTRY. Below this is a ribbon with tabs for File, Home, and a section for Employee Cockpit with buttons for New, Back, Today, Day, Week, Month, Forward, Record, and a Timer. The main area displays a table of time entries with columns for Start Date, Actual Duration, and Regarding. A bar chart on the right shows time entries for May 29 to June 5. At the bottom, there is a calendar view for June 2011 and a sidebar with navigation links for Dynamics HR, Human Resources, and other modules.

Please select the **"Employee Cockpit"** view in the dropdown area after starting the mask. After that, you can create and edit the time entries in three different ways:

1. Using the "New" button at the top
2. With a stopwatch
3. In the calendar view

The entered items will be immediately synchronized with the Microsoft Dynamics system and can be used for project reporting and controlling.



The screenshot displays the xRM1 HR Management interface. At the top, there is a menu bar with buttons for 'New', 'Today', 'Day', 'Week', 'Month', 'Forward', and 'Record'. A stopwatch icon labeled '00:00:00' is next to the 'Record' button. Below the menu bar, there is a table with columns for 'Start Date', 'Actual Duration', 'Regarding', and 'Subject'. The table contains several entries, including 'New Appointment', 'iOne CRM Phase Concept', 'Honag Inc', 'iOne CRM Implementati...', and 'iOne CRM preparation concept'. To the right of the table is a bar chart showing data for dates from May 29 to Jun 4. Below the table is a calendar view for June 2011, showing a grid of dates and times. A blue event is highlighted on June 2, 2011, at 9:00 AM. To the right of the calendar is a sidebar with a calendar for June 2011 and a form for 'Event properties' with fields for 'Title', 'Start', and 'End'.

### 5.2.1 Time Entry with the “New” button

To create a new entry, click on the **“New”** button, located on the left hand side of the menu (1). A new time entry line will be created in the grid; the item also appears in the calendar view (3). Now, you are able to edit the start/end time and/or duration, create a new title, and (if necessary) add a short description. You can use the look-up button to select the **“Regarding”** item. After selecting the button, you can search for the appropriate ‘regarding record’ via the Microsoft Dynamics look-up mask.

To complete your time entry, click on the diskette icon in the second column of the grid. The time is now recorded and the line will be greyed out.

To view an item in Microsoft Dynamics, use the calendar icon in the first column.

To delete a record, click on the **“Delete”** icon in the third column.

### 5.2.2 Time Entry with the stopwatch

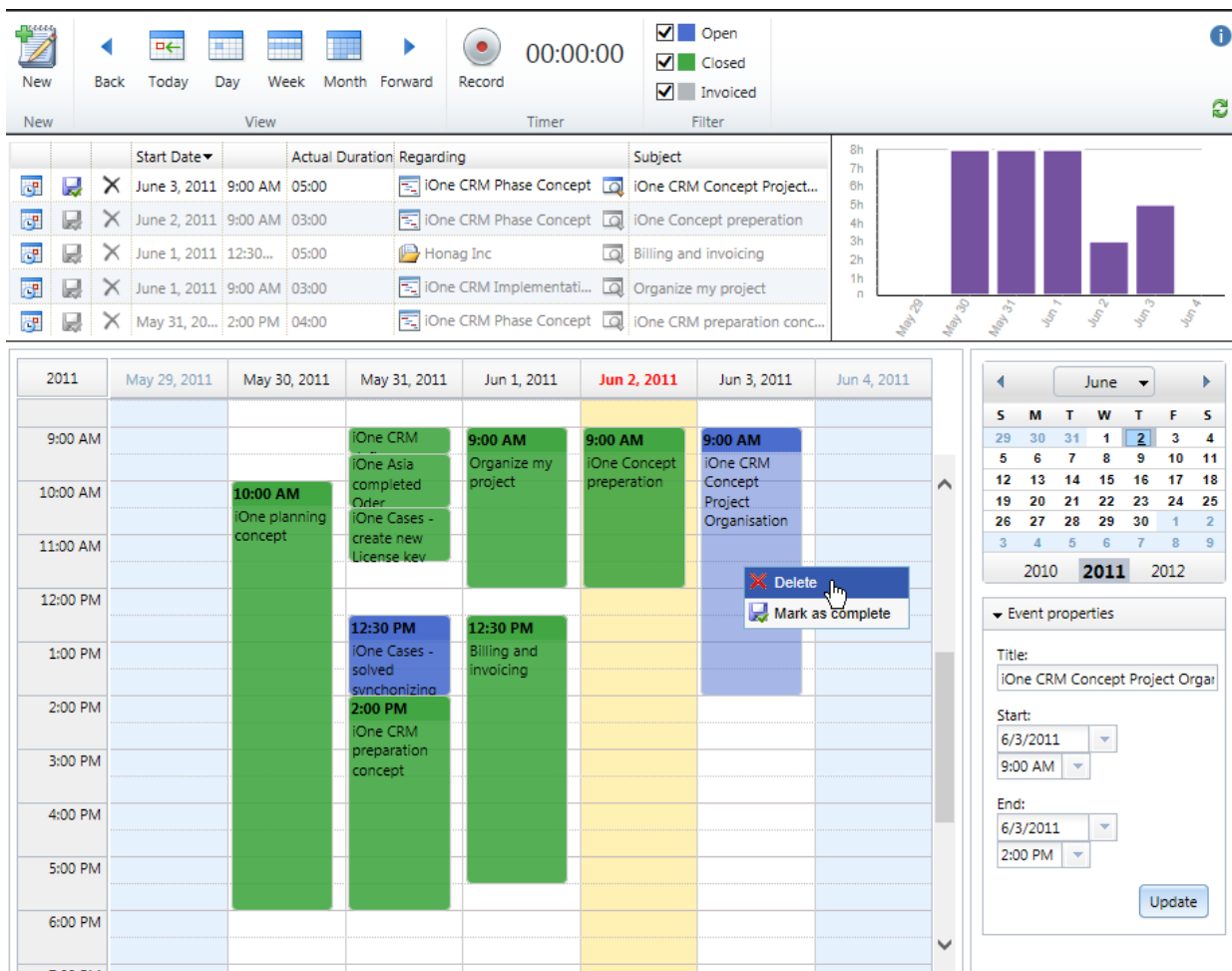
To track your current tasks, use the stopwatch or “Timer” in the upper menu (2).

To create a new entry, click on “Record”: the new item, and appropriate blue colored item, will be created in the grid. As with other time entries, you need to fill out the information related to the record. You can enter the information now or after you’ve stopped the timer. For recording, editing, or deleting the entry, use the options previously described.

### 5.2.3 Time Entry with the calendar view

To create a new entry in the calendar view (3), click once directly in the calendar: the new blue colored item will be created. Now you can edit the start/end time and/or duration by dragging and dropping the upper and lower boundaries of the item or moving them. Create a new title using the **“Event properties”** mask, on the right. To select the ‘regarding’ item, or for entering more details, you can use the grid view or open the record in Microsoft Dynamics by double clicking on the item in the calendar.

To complete your time entry, right-click on the created item and choose the **“Mark as completed”** option. The time is now recorded and the item color will change from blue to green. Choose the **“Delete”** option to delete the entry.



## 5.2.4 Graphical hours overview

A container displaying the hourly overview is available: a column chart shows the total number of hours entered for each day.

## 5.2.5 Navigation, views and filters

In the top bar, you will also find navigation and filtering functionalities. You can set and navigate between today, daily, weekly and monthly views, forwards and back. The filter for "open", "closed", and "invoiced" entries provides you with a more transparent and flexible view for creating and viewing your entries.

You can also use the calendar, on the right hand side, to navigate to a particular day.

## 5.2.6 Employee Cockpit Mask modification

The Employee Cockpit mask can be adjusted according to your individual needs:

- Elements and views can be rearranged or removed individually
- New elements (iFrames) can be added
- Columns in the table grid can be added, removed or rearranged

Be aware that the appropriate security role is required ("**System Administrator**" or "**System Customizer**").

### 5.2.6.1 Modifying grids and views

To customize the Employee Cockpit grids and views, go to "**Settings**" => "**Customizations**" => "**Customize the System**".

Find the "**xRM1 Employee Cockpit**" entity and click on the "**Employee Cockpit**" form.



The screenshot shows the Microsoft Dynamics CRM form editor interface. The top ribbon includes tabs for File, Home, and Insert. The Home tab is active, showing various editing tools like Save, Save As, Save and Close, Publish, Change Properties, Remove, Undo, Redo, Header, Footer, Body, Navigation, Form Properties, Preview, Assign Security Roles, Show Dependencies, and Managed Properties. The left sidebar displays a tree view with 'Employee Cockpit' selected, showing sub-items like 'General', 'Common', 'Sales', 'Service', 'Marketing', and 'Processes'. The main workspace shows the 'Form: xRM1 Employee Cockpit' with a 'Header' section containing three empty text boxes. Below the header is a 'Section' containing three elements: 'Ribbon', 'Grid', and 'Calendar'. The 'Grid' element is highlighted with a blue border. To the right of the 'Grid' is a 'Chart Total Hours' element. Below the 'Section' is a 'General' section. At the bottom is a 'Footer' section containing a 'Status' label and a text box.

The three **"Ribbon"**, **"Grid"** and **"Calendar"** areas are now displayed. They correspond to the relevant areas in the **"Employee Cockpit"** mask. You can replace or remove the elements by using standard Microsoft Dynamics customizing functions. To change the size of an area, click on the applicable element, go to the tab **"Formatting"** and then to **"Row Layout"**. Change the amount of rows and (as a result) the size of the element will also increase or decrease.





**Field Properties**  
Modify this field's properties.

Display   Formatting   Details   Events

Layout

Select the number of columns the control occupies:

☐ One column

☐ Two columns

☐ Three columns

☒ Four columns

Row Layout

Select the number of rows the control occupies.

Number of Rows

☐ Automatically expand to use available space.

Help   OK   Cancel

#### 5.2.6.2 Add new elements

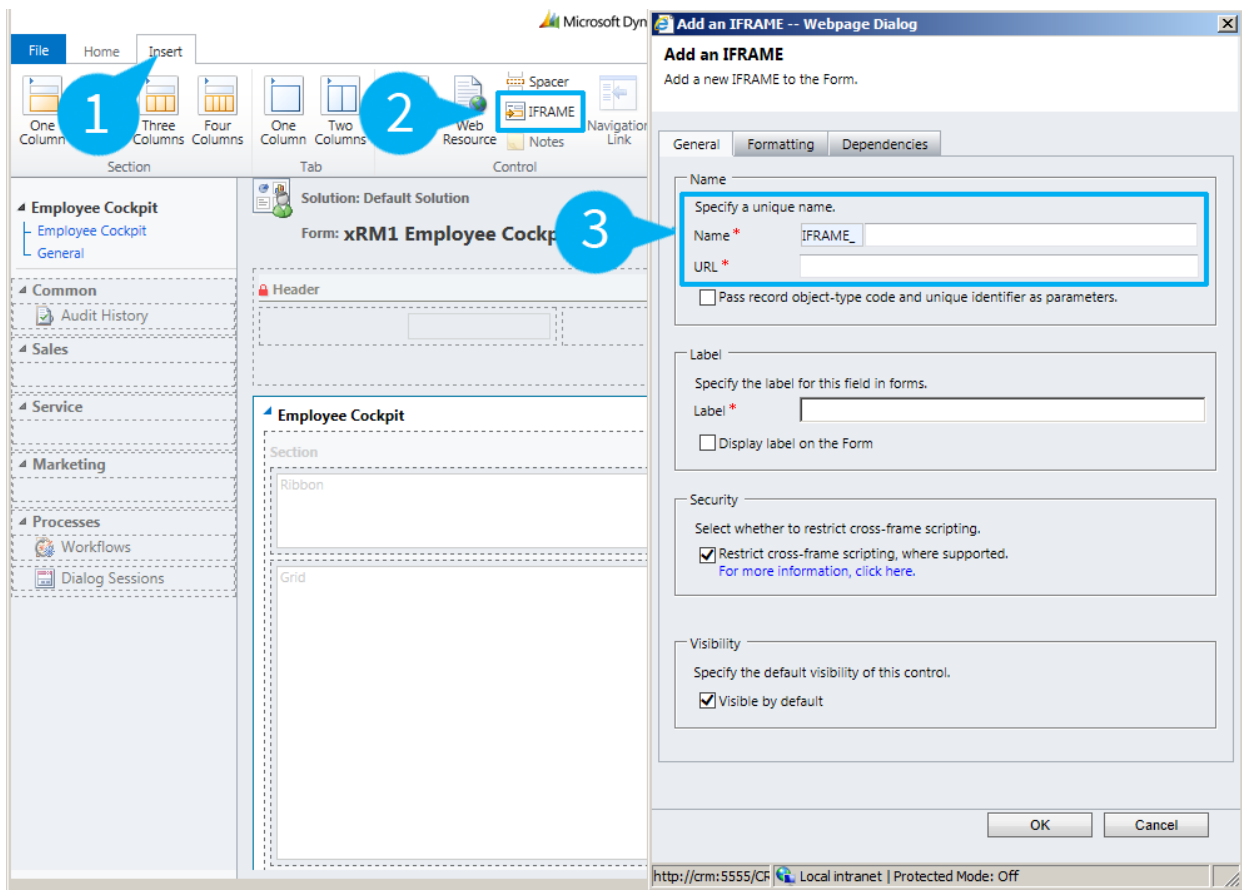
You can also add additional elements (iFrames) to the Employee Cockpit. To do this, use the **"Insert"** tab in the **"Employee Cockpit"** form.

You need to know the parameters of the iFrame, such as the iFrame-name and URL.

For example, you can add the CRM-Project Work Schedule (if you have the appropriate license) as a new iFrame. Use the following parameters:

**IFRAME\_:** xrm1\_work\_schedule

**URL:** [http://crm:5555/CRM/WebResources/itarapro\\_/web/PersonalWorkSchedule.html?userIcid=1033](http://crm:5555/CRM/WebResources/itarapro_/web/PersonalWorkSchedule.html?userIcid=1033)



After saving and publishing, you can see the following result:



**Navigation and Filter:**

- New** | **Back** | **Today** | **Day** | **Week** | **Month** | **Forward**
- Record** | **00:00:00** | ☒ **Open** | ☒ **Closed** | ☒ **Invoiced**
- Filter**

**Table Grid:**

	Start Date	Start time	End time	Regarding	Subject	Description
	June 3, 2011	8:00 AM	12:30	BLI DB Sub CRM Realisation	Leave from 6/3/2011 to 6/3...	
	June 2, 2011	9:00 AM	03:00	iOne CRM Phase Concept	iOne Concept preparation	

**Calendar View:**

2011 | May 29, 2011 | May 30, 2011 | May 31, 2011 | Jun 1, 2011 | **Jun 2, 2011** | Jun 3, 2011 | Jun 4, 2011

8:00 AM | 9:00 AM | 10:00 AM | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00 PM

**Event Properties:**

Title: Leave from 6/3/2011 to 6/3/2011  
Start: 6/3/2011 8:00 AM  
End: 6/3/2011 8:30 PM  
**Update**

**Weekly View:**

Start: 6/2/2011 | End: 6/18/2011 | Name: Paul Morrison | ☒ Load cached user data

CW: 23 (2.6 - 4.6) | CW: 24 (5.6 - 11.6)

2. (Thu) | 3. (Fri) | 4. (Sat) | 5. (Sun) | 6. (Mon) | 7. (Tue) | 8. (Wed) | 9. (Thu) | 10. (Fri) | 11. (Sat)

iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement | iOne CRM Implement

Contoso Development | Contoso Development | Unavailable | Unavailable | Contoso Development | Contoso Development | Contoso Development | Contoso Development | Contoso Development | Unavailable

iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept | iOne CRM Phase Concept

Call Peter Lead M | Plan Workshop | Request Lead | Call Anthonz for i | Call Customzer

**Legend:**

- Project: Planning (Orange), Service Activities (Yellow), Urgency ratio (Blue), Red border = Availability is critical
- Capacity: Available (White), Unavailable (Grey), Absence (Red), leave / Business closure (Pink)

### 5.2.6.3 Add, remove or rearrange columns in the table grid

You can also rearrange, add or remove the columns in the table grid:

	Start date	Start time	End time	Duration	Regarding	Title	Description
	June 3, 2011	9:00 AM	2:00 PM	05:00	iOne CRM Phase Concept	iOne CRM Concept Project Organ...	
	June 2, 2011	1:30 PM	2:30 PM	01:00	License expired	Create new License	
	June 2, 2011	9:00 AM	12:00 PM	03:00	iOne CRM Phase Concept	iOne Concept preparation	
	June 1, 2011	12:30 PM	5:30 PM	05:00	Honag Inc	Billing and invoicing	

To do this, go to **"Settings"** => **"Customizations"** => **"Customize the System"** => **"Activity"** => **"Views"** => **"Inactive Public Views"** and then select the **"xRM1 Employee Cockpit Grid"**. Now you can add, remove or rearrange the columns through standard Microsoft customizing functions.

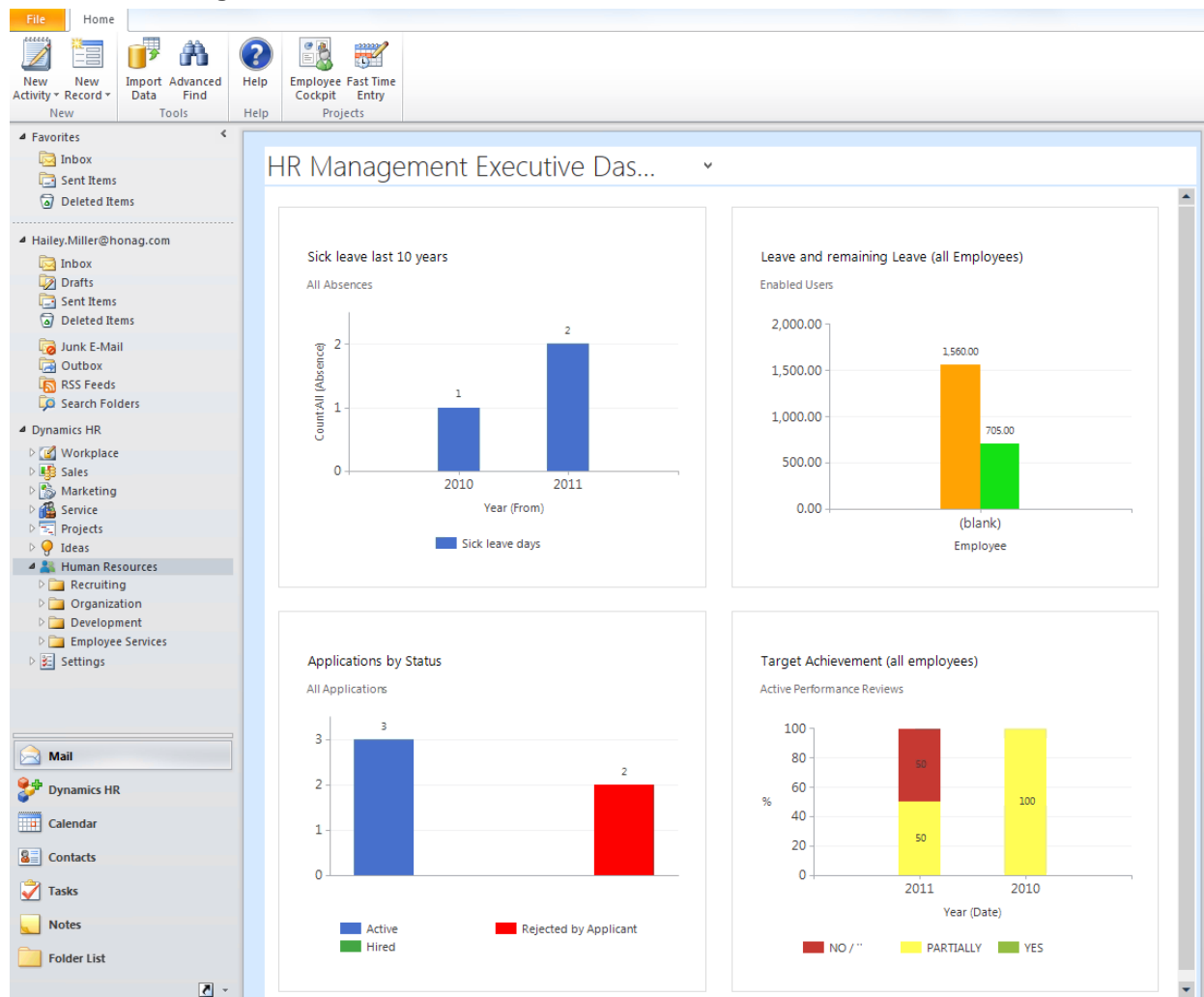


## 6 My Work – HR Management Controlling

### 6.1 Dashboards

"xRM1 HR Management" offers dashboards for HR managers and employees.

#### 6.1.1 HR Management Executive Dashboard

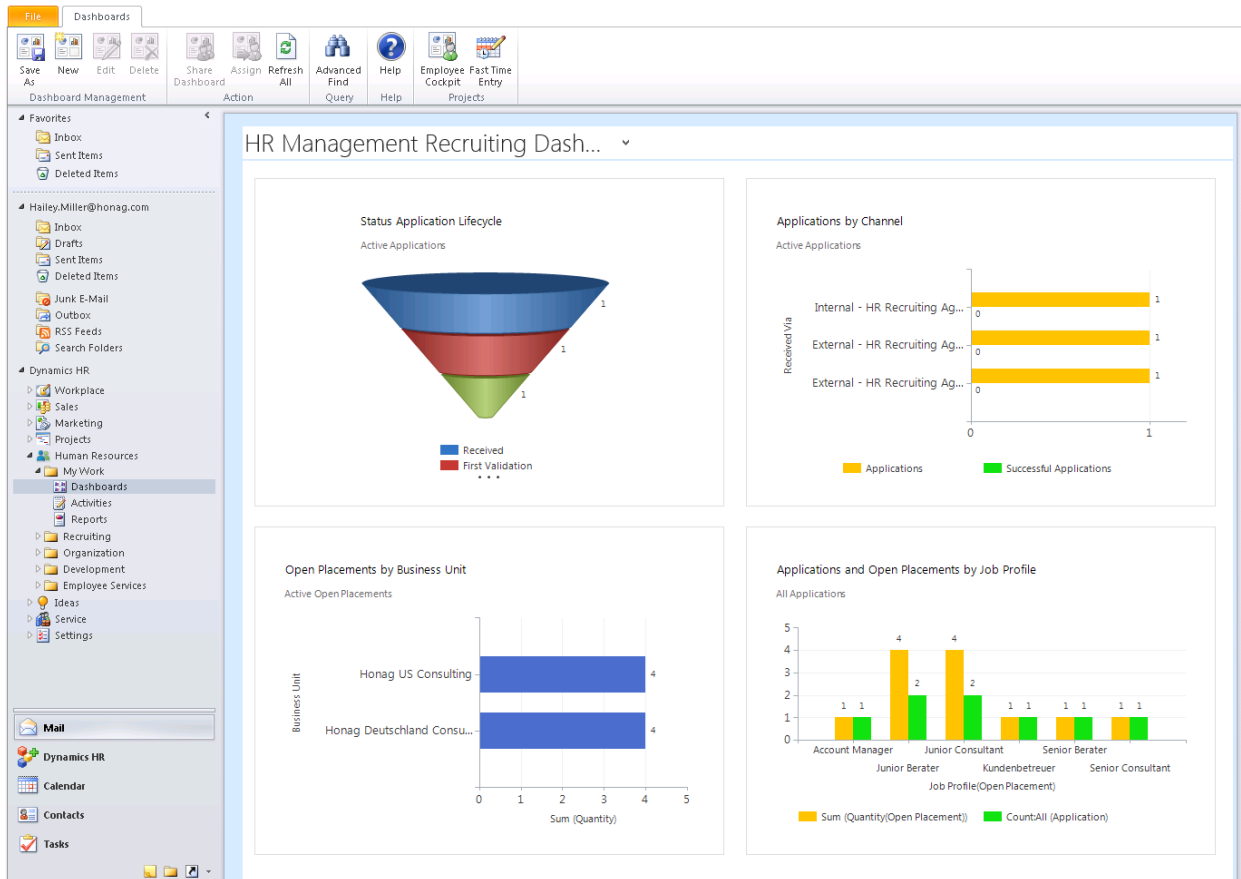


The most important parameters for HR Executives can be seen at a glance. This dashboard includes the following charts:

- **"Sick leave last 10 years":** This chart adds up the total amount of days considered as sick leave over the last ten years.
- **"Leave and remaining Leave (all employees)":** Comparison of leave and remaining leave for all employees.
- **"Applications by Status":** Overview of the applications, sorted by status.
- **"Target Achievements (all employees)":** This chart shows how many percent of all employees' targets have been completed (totally or partially) or not.



## 6.1.2 HR Management Recruiting Dashboard

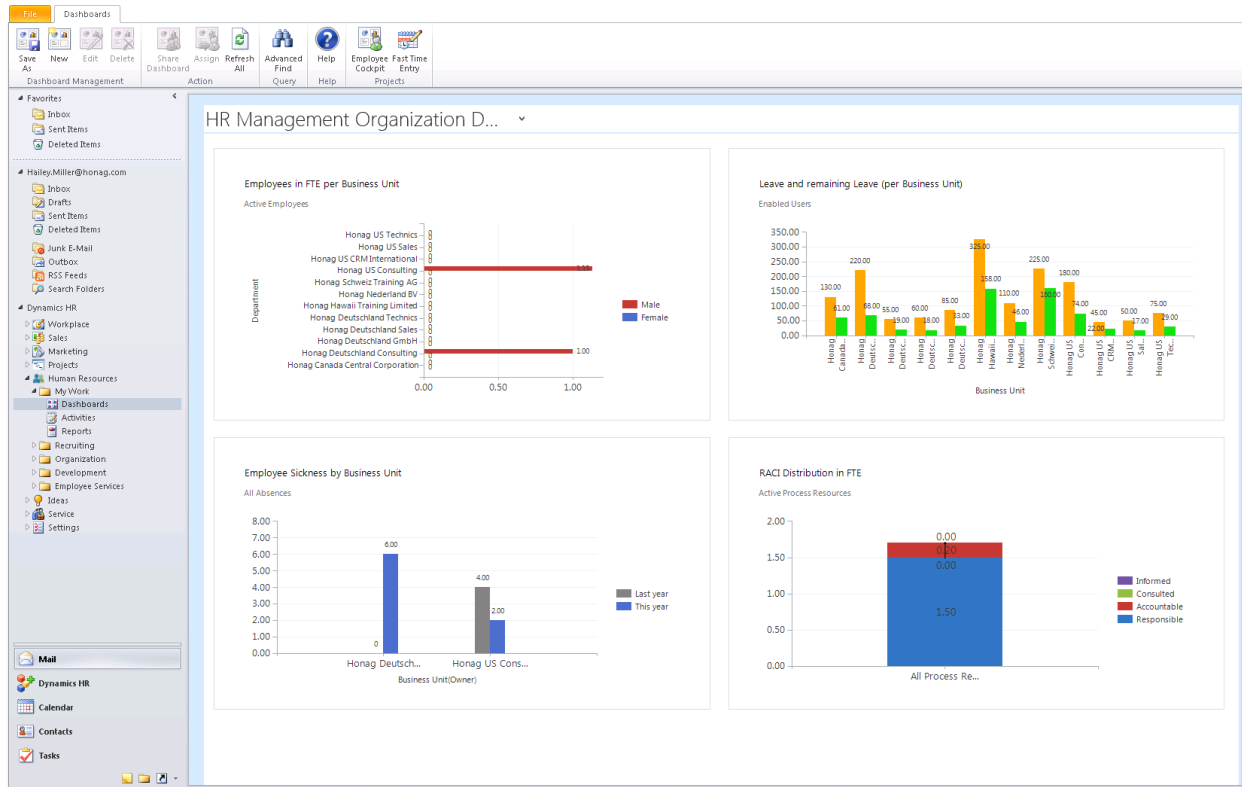


The dashboard for HR recruiting includes the following charts:

- **"Status Application Lifecycle"**: This funnel chart gives an overview of the amount of applications in each status reason.
- **"Applications by Channel"**: Total amount of applications and successful applications for each recruiting channel.
- **"Open Placements by Business Unit"**: Amount of open placements, sorted by business unit.
- **"Applications and Open Placements by Job Profile"**: This chart compares the number of open placements per job profile to the respective applications.



### 6.1.3 HR Management Organization Dashboard

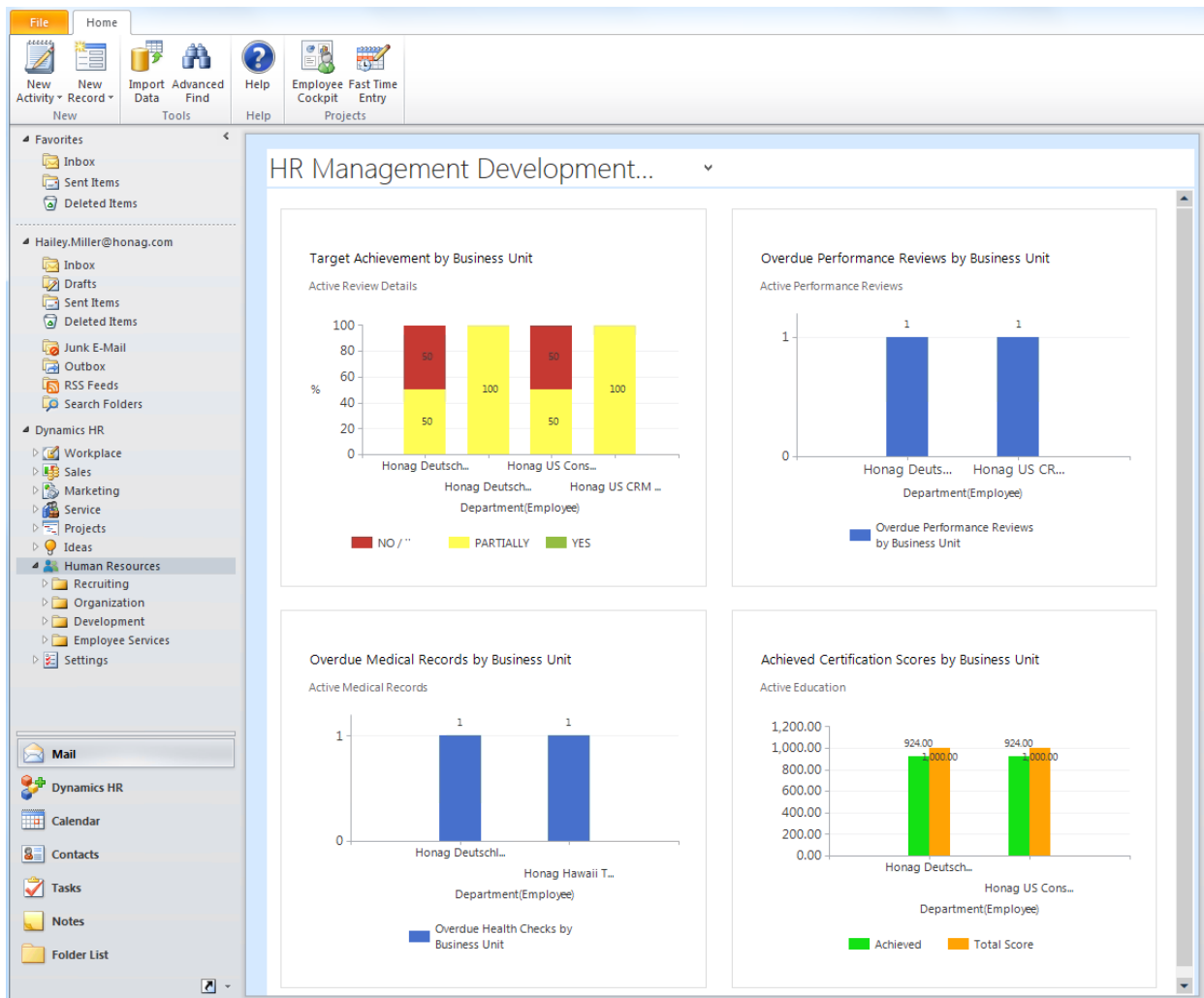


The most important parameters concerning HR Organization can be seen at a glance. This dashboard includes the following charts:

- **"Employees in FTE per Business Unit":** This chart adds up the amount of assigned FTE, sorted by business unit.
- **"Leave and remaining Leave (per Business Unit)":** Comparison of leave and remaining leave, sorted by business unit,
- **"Employee Sickness by Business Unit":** Overview of sick leave days, sorted by business unit
- **"RACI Distribution in FTE":** This chart shows how many FTE are assigned to which RACI role.



### 6.1.4 HR Management Development Dashboard

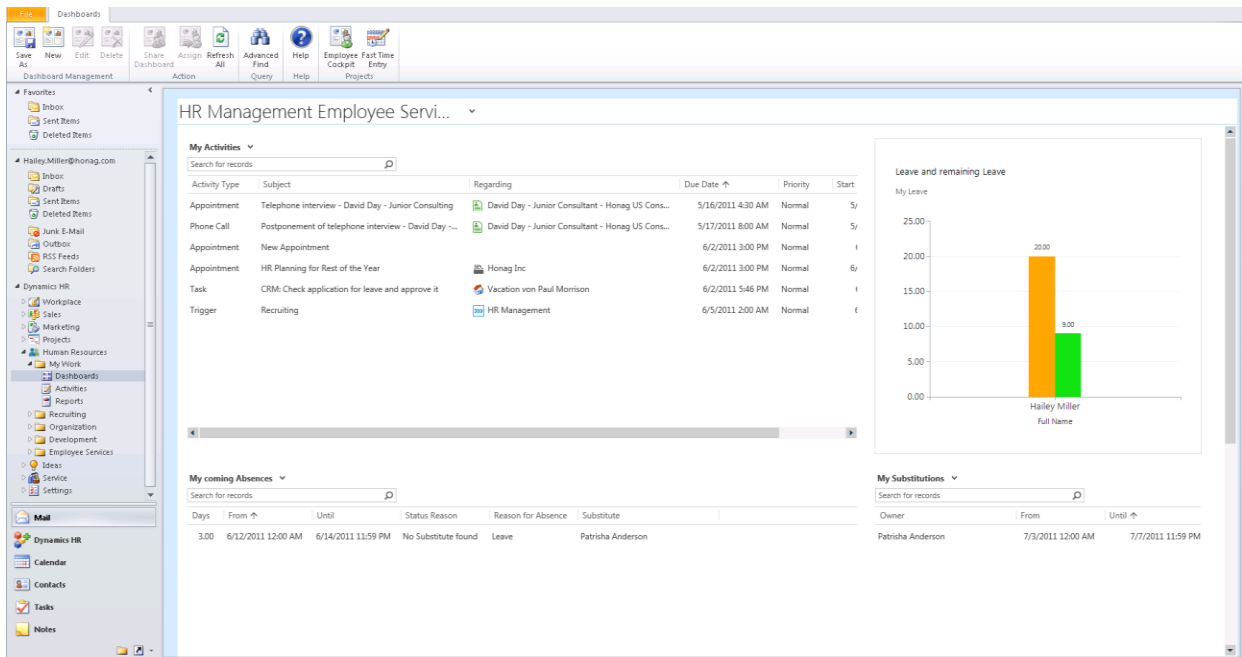


The dashboard for HR development includes the following charts:

- **"Target Achievement by Business Unit":** This chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.
- **"Overdue Performance Reviews by Business Unit":** Overview, how many performance reviews for employees are overdue, sorted by business unit.
- **"Overdue Medical Records by Business Unit":** This chart shows how many medical records for employees are overdue, sorted by business unit.
- **"Achieved Certification Scores by Business Unit":** The user can get an impression, how many points of how many total points were achieved at in education exams and certificates, sorted by business unit.



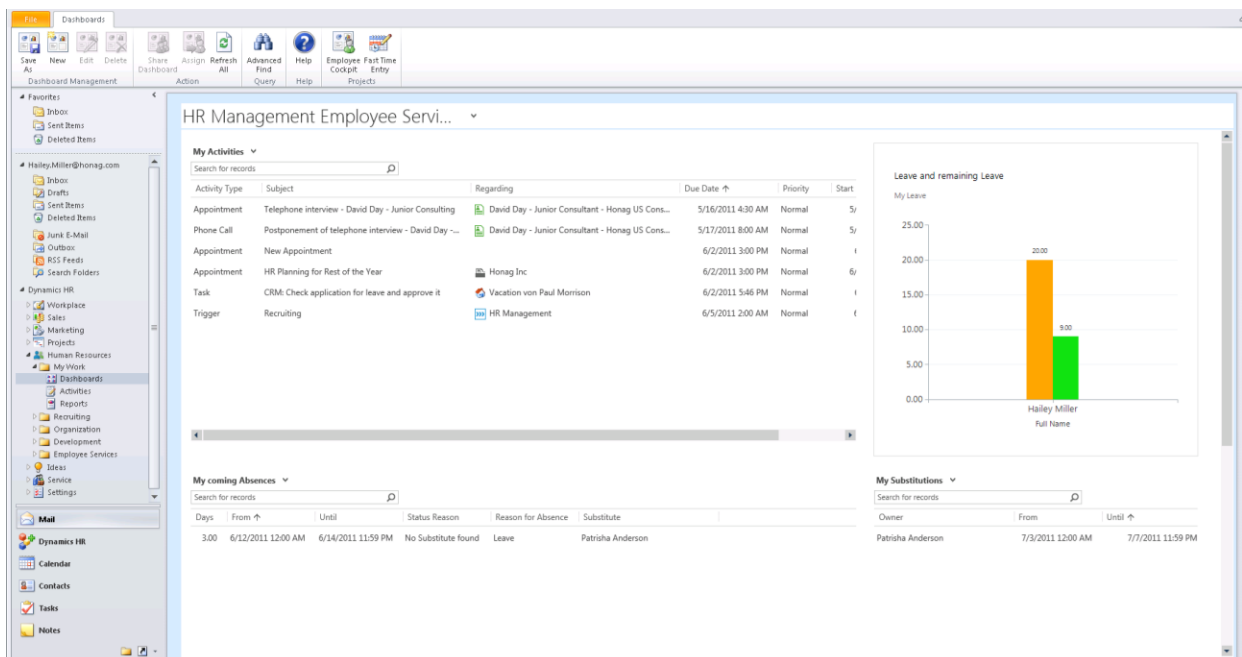
## 6.1.5 HR Management Employee Services Dashboard



This dashboard displays charts and lists concerning relevant HR features for each employee:

- **"My Activities"**: Overview of the employee's activities.
- **"Leave and remaining Leave"**: Comparison of the employee's leave and remaining leave.
- **"My coming Absences"**: The employee's upcoming absences.
- **"My Substitutions"**: List of dates when the employee is a substitute for a colleague.
- **"Internal open Placements"**: List of open placements which have been published internally.
- **"My Target Achievements"**: This chart shows how many percent of the employee's targets have been completed (totally or partially) or not.

## 6.2 Activities

















As default chart, **"Activities by month"** is displayed in the Outlook start screen of this entity. A column chart shows the activities per month, sorted by status reason.

Below you will see an overview of all available activities:





-  Task
-  Fax
-  Phone Call
-  Email
-  Letter
-  Appointment
-  Service Activity
-  Campaign Response
-  Campaign Activity
-  Recurring Appointment
-  Material Usage
-  Rendered Service
-  Resource Usage
-  Trigger

Depending on the user's security roles, he/she may use Microsoft Dynamics standard activities. In case **"CRM-Project"** is available, the user may also use **"Material Use"**, **"Rendered Service"** and **"Resource Usage"**.



### 6.3 Human Resource Report

calculate since:

1 of 1

100%

Find | Next

## Human Resource

**Employee:**  
Paul Morrison

**Title:**  
Project Manager

**Costs/h:**  
\$90.00

**Telephone:**

**E-Mail:**  
Paul.Morrison@honag.com

**HR Manager:**  
Hailey Miller

**Manager:**  
Ethan Carter

**Leave Manager:**  
Ethan Carter

**Site:**  
New York - USA

**Business Unit:**  
Honag US Consulting

<b>Leave Overview [MD]</b>	<i>total:</i>	20.00
	<i>leave requested:</i>	2
	<i>taken since selected date:</i>	
	<i>approved:</i>	
	<i>remaining leave:</i>	7.00
<b>Absence [MD]</b>		2
<b>Project time reported [h]</b>	<b>internal</b>	<b>external</b>
<i>Task</i>	7.00	3.00
<i>Appointment</i>	7.00	5.50
<i>E-Mail</i>	9.00	9.00
<i>Letter</i>	0.00	0.00
<i>Fax</i>	0.00	0.00
<i>Telephone</i>	0.00	7.00
<i>Service</i>	0.00	3.00
<i>Rendered Service</i>	0.00	0.00
<b>Total</b>	<b>23.00</b>	<b>27.50</b>

Effective 6/3/2011 7:00:27 PM
Prepared by Paul Morrison
page 1 of 1

The **"Human Resource"** report offers an overview of an employees' HR base data, his/her leave and absences, as well as reported project time.

The date from which the report data should be displayed, can be selected in the **"Calculate since"** field.

The HR base data consist of the following fields:

**"Employee"**: The employee for whom the report was selected.

**"Title"**: The employee's job title.

**"Costs/h"**: The employee's hourly rate.

**"Telephone"**: The employee's phone number.

**"E-Mail"**: The employee's e-mail address.

**"HR Manager"**: The HR representative responsible for the employee.

**"Manager"**: The employee's direct supervisor.

**"Leave Manager"**: The person who approves the employee's absences/leave.

xRM1 HR Management Rollup 15 and higher

74 / 86



**"Site":** The site of the employee's business unit.

**"Business Unit":** The employee's business unit.

In the **"Leave overview [MD]"** and **"Absence"** section, the following fields are displayed:

**"Total":** The total amount of the employee's vacation days.

**"Leave requested":** Number of vacation days the employee has requested.

**"Taken since selected date":** Amount of vacation days the employee has taken since the selected day.

**"Remaining Leave":** Number of vacation days remaining.

**"Absence [MD]":** The employee's number of absence days.

Finally, the internal and external "Project time reported [h]" will be displayed for the following activities:

- **"Task",**
- **"Appointment",**
- **"E-Mail",**
- **"Letter",**
- **"Fax",**
- **"Telephone",**
- **"Service" and**
- **"Rendered Service".**



## 7 Rights and roles concept

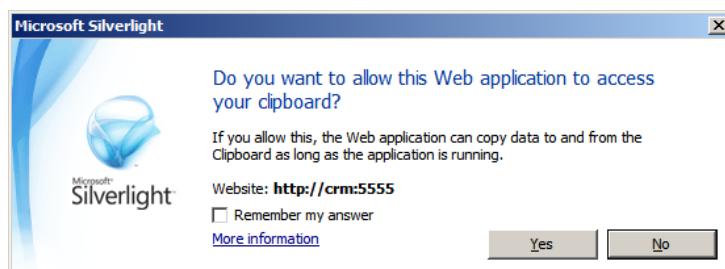
### 7.1 Default settings

#### 7.1.1 Licensing

You can enter and save your license in the license field. This field can be found under **"Configuration"**, when selecting the relevant solution under **"Settings"** --> **"Solutions"**.

For creating a license, your Microsoft Dynamics Organization Unique Name is required. Your MS Organization Unique Name is determined automatically and is displayed directly on the configuration screen. With the integrated copy function the name, as well as other license relevant data (company name and e-mail), can be readout and forwarded.

In order to create your data for the license, please enter them in the respective fields under **"License report and request"** and press **"Copy"**. Please confirm the copying by pressing **"Yes"**, when you are prompted with the Silverlight window, as shown below.



Now, we ask that you paste your data (**"Strg"+"V"**) into an editor or directly into an e-mail.

The data is saved as an XML string and appears as follows:

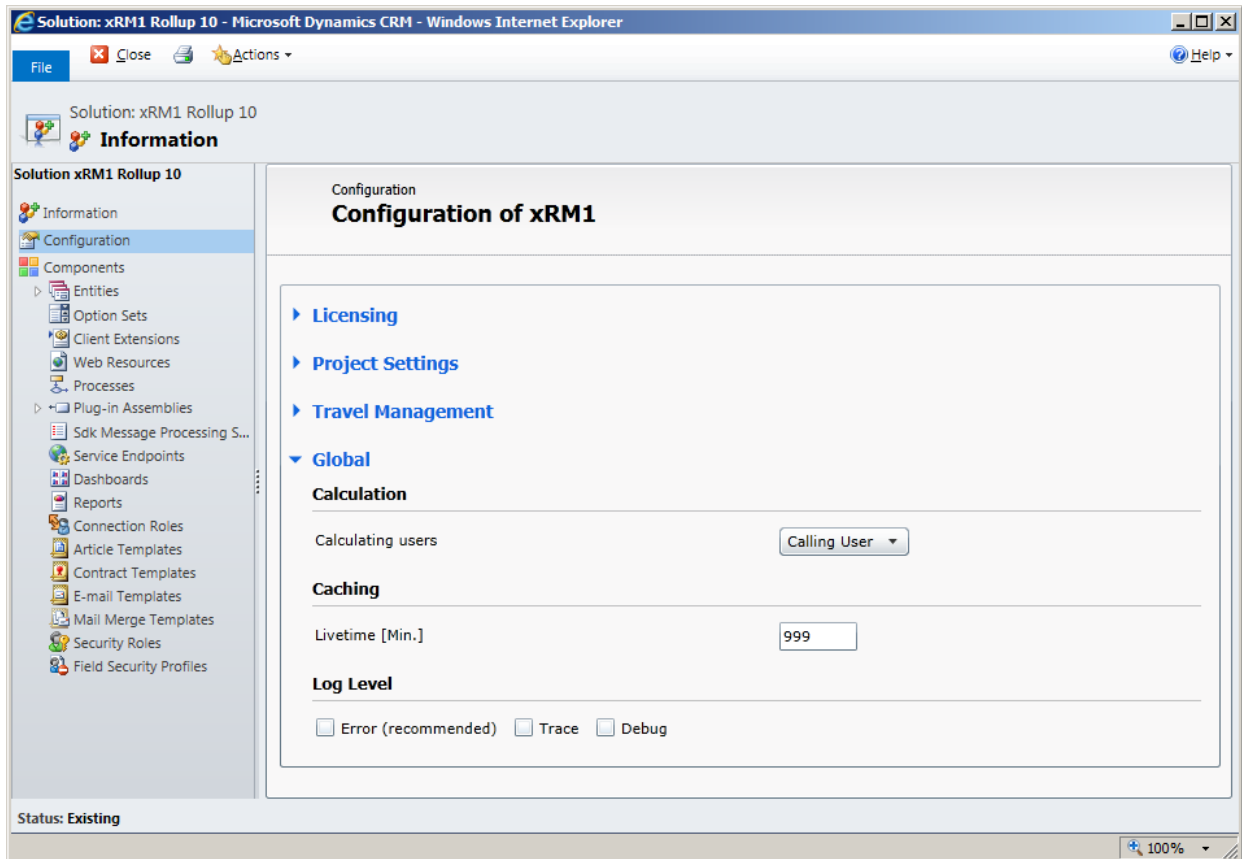
```
<LicenseInformation><CompanyName>Firma
XY</CompanyName><EMail>firmaxy@email.com</EMail><OrgUniqueName>CRM</OrgUniqueName></LicenseI
nformation>
```

Please do not modify the record, but rather send it directly to xRM1, along with information about the desired license types and their amounts, by using the license request form in the portal. Please refer to the website [www.xRM1.com](http://www.xRM1.com) for license requests.

The license file will then be created and sent to you via e-mail. The license can be used right away, after you've uploaded it into the solution.



## 7.1.2 Global



**"Caching"**: Specify how long cached userspecific calendar availability should be valid for. The less often you change the calendar settings (e.g. user work hours), the more you can increase the values.

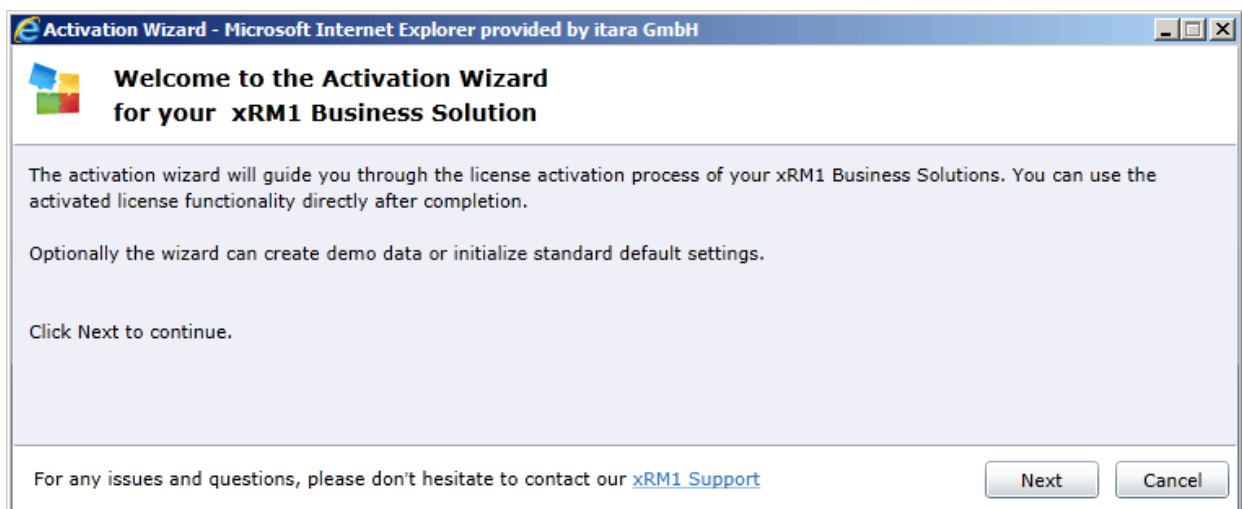
**"Log Level"**: Specify the log level for the xRM1 solution. We recommend the **"Error"** setting.

## 7.2 Installation

Instructions on how to install the solution can be found in our **"Getting Started Guide"**. You can download this from the xRM1 website. The guide can be found under **"Products"**, **"xRM1 HR Management"**, and **"Downloads"** (on the right hand side).

## 7.3 Solution activation (Activation Wizard)

Activating the solution can be done easily with the **"Activation Wizard"**. This can be found on the ribbon bar under **"Settings"** → **"xRM1 License Types"**.



You will begin by being asked whether you would like to activate a test version, temporary or purchased license.



**Activation Wizard - Microsoft Internet Explorer provided by itara GmbH**

**License activation for xRM1 Business Solutions**  
(Page 1 of 5)

**Activation options:**

- ☒ I would like to begin with a free trial (without license, valid 14 days beginning with import)
- ☐ I would like to use a temporary License
- ☐ I would like to upload a license

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Next Cancel

### 7.3.1 Activating a free trial

Here, you choose the solution(s) which you would like to be activated, by checking the applicable boxes.

**Activation Wizard - Windows Internet Explorer**

**Selecting your xRM1 Business Solution(s)**  
(Page 2 of 5)

Which solution(s) would you like to activate for testing?

**CRM-Project**

- ☐ CRM-Project Employee
- ☐ CRM-Project Standard Billing and Invoicing
- ☐ CRM-Project Standard Resource Management
- ☐ CRM-Project Professional
- ☐ CRM-Project Enterprise

**Idea Management**

- ☐ Idea Management Employee
- ☐ Idea Management Professional

**Time Tracking**

- ☐ Time Tracking Employee
- ☐ Time Tracking Professional

**HR Management**

- ☒ HR Management Employee
- ☒ HR Management Supervisor
- ☒ HR Management Manager

For any issues and questions, please don't hesitate to contact our support. [xRM1 Support](#)

Back Next Cancel

100%

In the next step you have the option to create default settings and base data. Please select the applicable boxes.



**Activation Wizard - Microsoft Internet Explorer provided by itara GmbH**

**Default settings and demo data (optional)**  
(Page 3 of 5)

The wizard can initialize default settings and create demo data.  
We recommend this especially for trials.

Please take note that the default settings are required, for the proper use of each xRM1 Business Solution.

The activation wizard completes this process for you.

☒ Create default settings (recommended for trial)  
This will automatically initialize the configuration of your solutions (like number ranges, labeling, etc.)  
Existing settings remain unchanged  
[xRM1 Settings](#)

☒ Create demo data (recommended for trial)  
This will automatically create demo data (like products, price lists, services, etc.)  
[xRM1 Demo](#)

Alternatively, you can enter the settings manually. You can find the settings under CRM=> Settings => Customize => Solutions  
=> The\_4th\_Module / xRM1 => Configuration

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

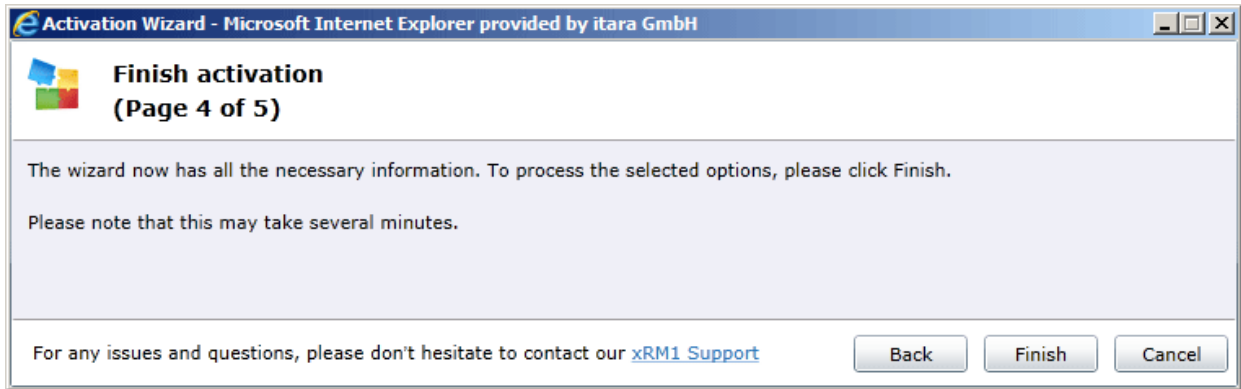
[Back](#) [Next](#) [Cancel](#)

We recommend applying the default settings in the instance you are running a test version or when you would like to quickly and productively start your xRM1 business solution. For advanced use, additional configurations are recommended. The following data will be created:

<b>Setting</b>	<b>Default</b>	<b>Description</b>
Hours per Man Day [h]	8	Select the number of work hours, per work day, of a full-time employee.
Number of recently used regarding entities	5	Specify how many recently used items to list in the Fast Time Entry
How long Time Entry can be edited [h]	24	The length of time in which corrections can be made to Fast Time Entries.
Current project number	0000001	Number sequence for automatic project numbering.
Project number prefix	PRO	Prefix for automatic project numbering
Travel time/travel expenses added to the project	Active	This setting specifies whether associated trips, travel times, and related travel expenses should be added to a project or not.
Current travel number	0000001	Number sequence for automatic travel numbering.
Travel number prefix	TRV	Prefix for automatic travel numbering.
Current receipt number	0000001	Number sequence for automatic receipt numbering.
Receipt number prefix	VOU	Prefix for automatic receipt numbering.
Cache	500	Length of time in which cached user-specific calendar availability should be valid for.
Log level	Error	Here, the log level is set.



The activation can subsequently start.

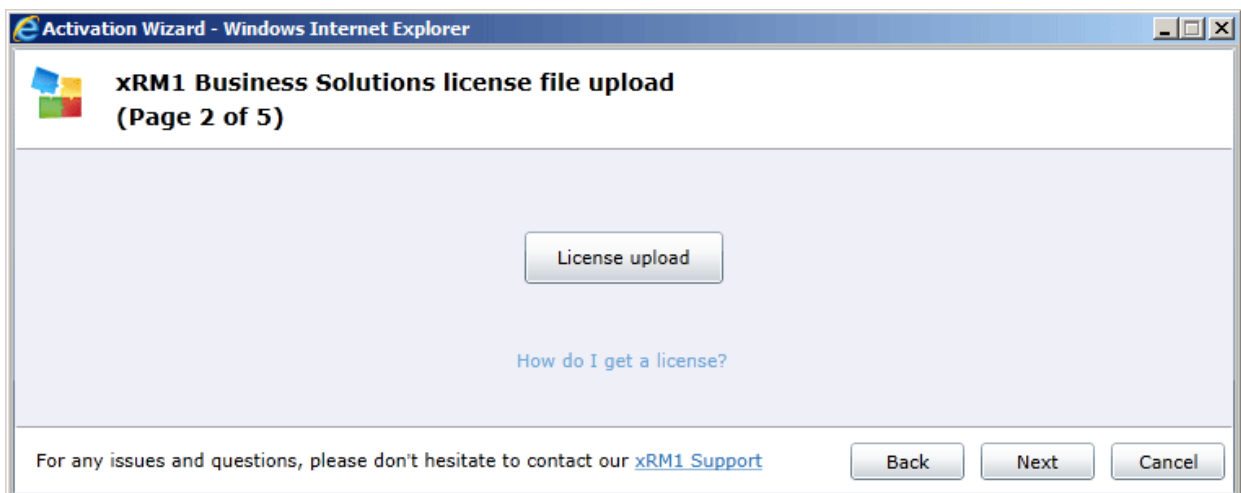


After the activation has finished, the following message will appear.



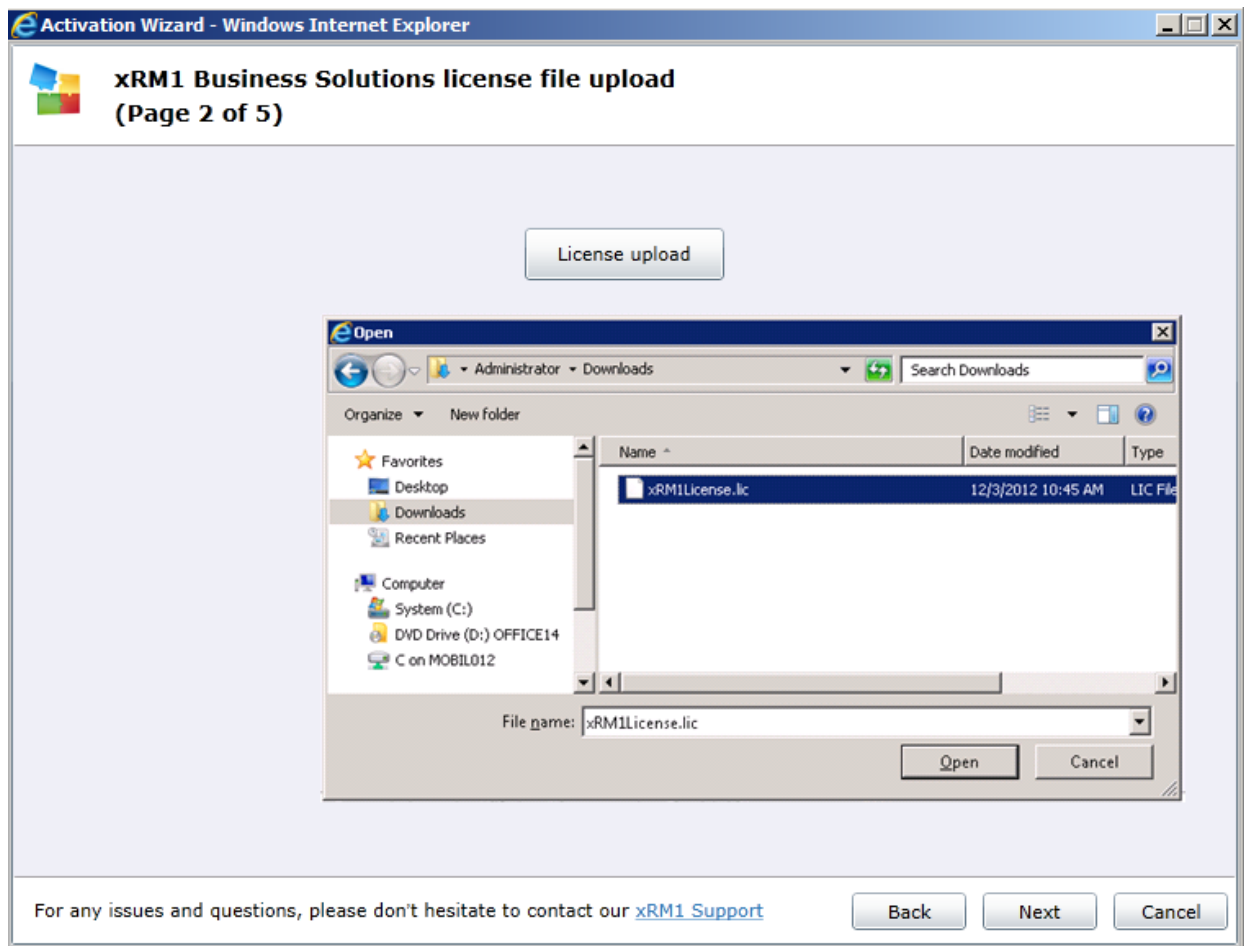
### 7.3.2 Activating temporary or purchased license(s)

When you select the option to activate a temporary or permanent license, a window will appear where you will be able to upload the license.

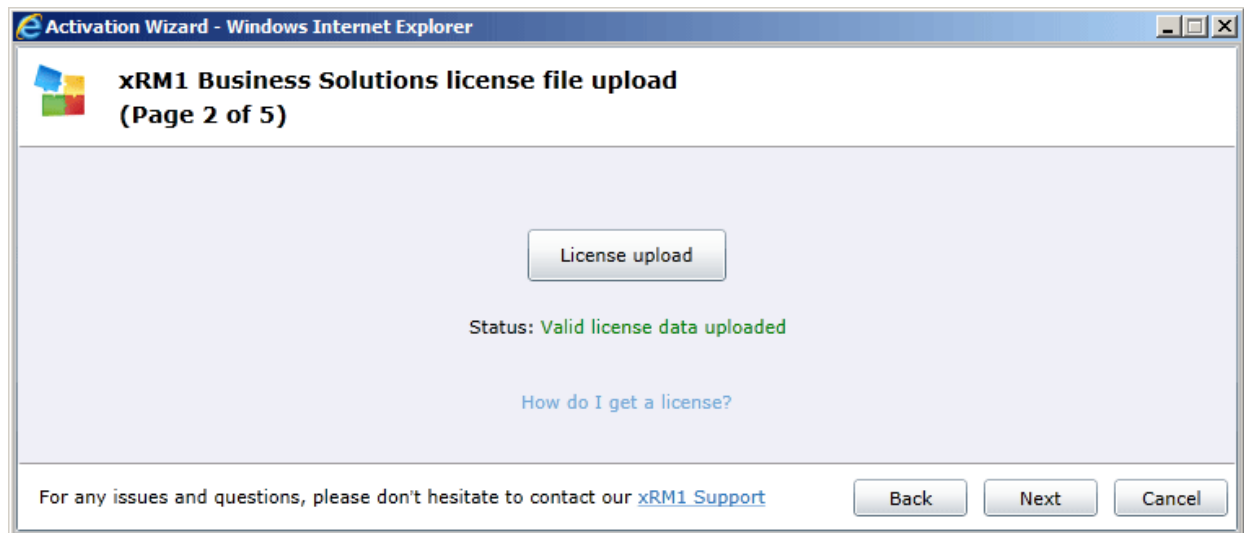


Selecting the corresponding button will prompt an Internet Explorer window to open, allowing you to select your saved license data.





After selecting "**Open**", the data will be uploaded and a message will appear indicating whether you have uploaded a valid or expired license.



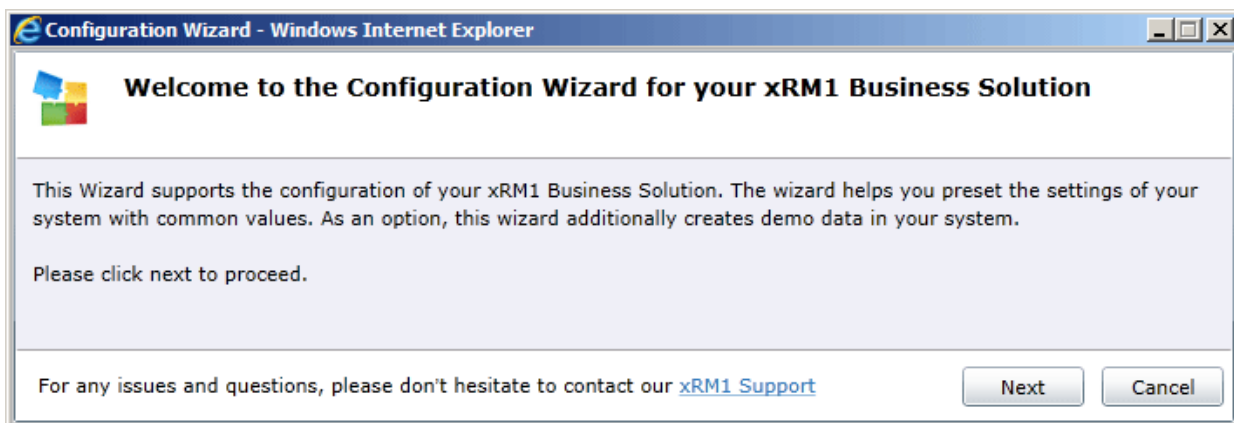
The next few steps are identical with steps 3 to 5, with free test licenses. Next, select whether you would like to implement standard settings and/or basic data/demo data. This will subsequently help to activate the license as well as complete the activation.

You can also request and upload your license through the xRM1 Configuration window. For more information, please see chapter 7.1.1.

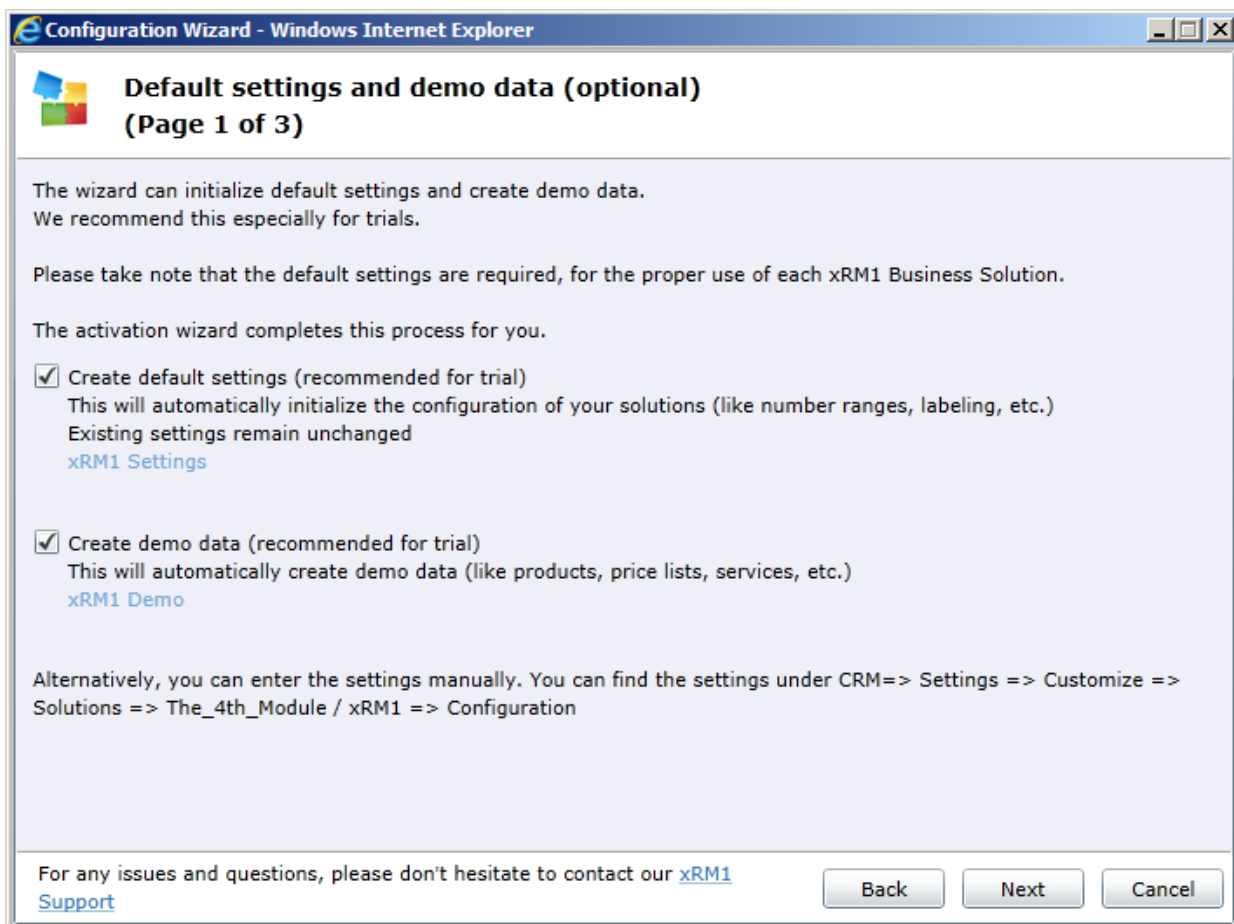
## 7.4 Solution configuration (Configuration Wizard)

The Configuration Wizard is a part of the Activation Wizard but can be run separately. This can be the case when basic data/demo data or settings will be created at later point in time.

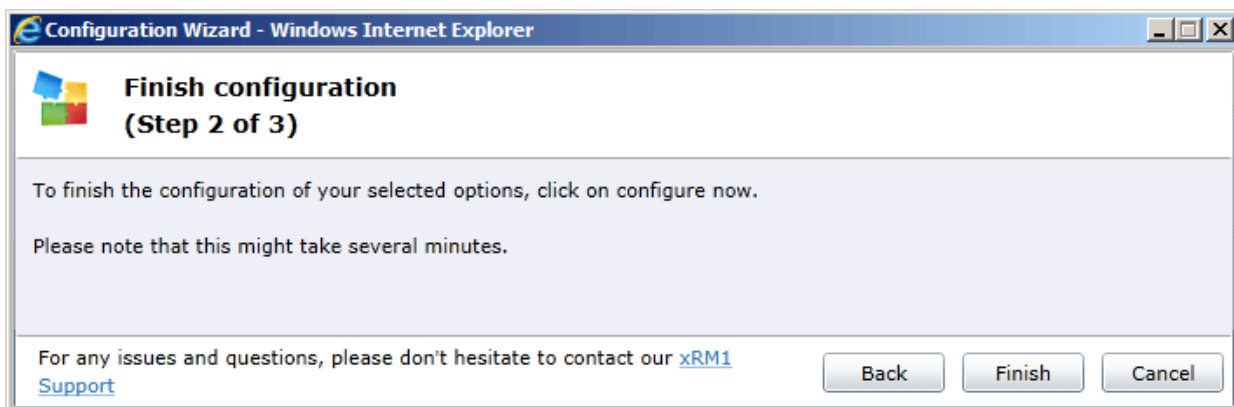
**Note:** Using the "**Configuration Wizard**" will not override any already existing data.



Here you have the option to select whether you would like to activate a free test version, a temporary or a permanent license. Instead, one begins directly with selecting basic settings and/or base data .

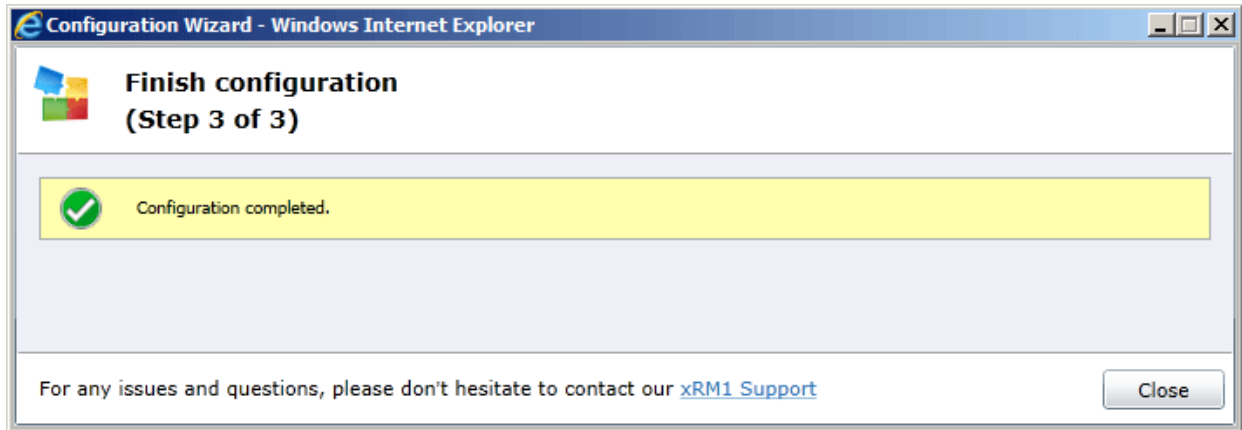


Then, confirm the selected configuration.





After the configuration is complete, the following window will appear:



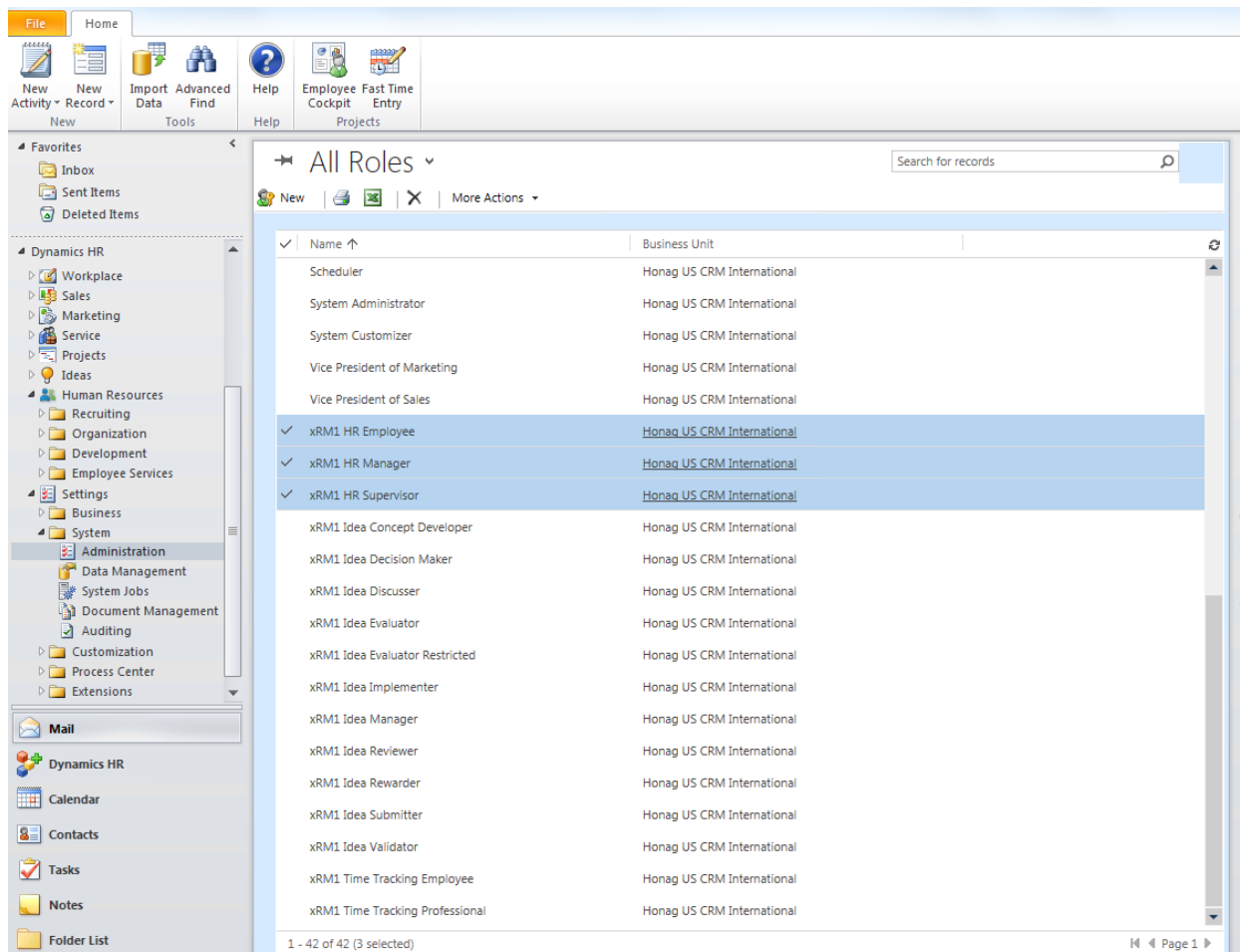
## 7.5 License management

For "**xRM1 HR Management**", every user needs to have a valid license; this can be customized in each Microsoft Dynamics user. Assigning a license, the user gets the following security roles according to the following chart:

	<b>xRM1 HR Management License Type</b>			
<b>Security Role</b>	<b>Staff</b>	<b>Employee</b>	<b>Supervisor</b>	<b>HR Manager</b>
xRM1 HR Employee		X	X	X
xRM1 HR Supervisor			X	X
xRM1 HR Manager				X

## 7.6 Roles concept

"**xRM1 HR Management**" uses the standard rights and roles concept of Microsoft Dynamics. The settings in the roles are used as basic settings and can be configured further to the specific requirements of your organization. Please refer to the Microsoft Dynamics standard customization documentation for detailed information on configuring security roles.



## 7.7 xRM1 HR Management security roles

The following roles are available in the delivered configuration:

### 7.7.1 xRM1 HR Employee

All users who want to use employee services, expense tracking and see their personal development need this security role. It is included in all license types.

### 7.7.2 xRM1 HR Supervisor

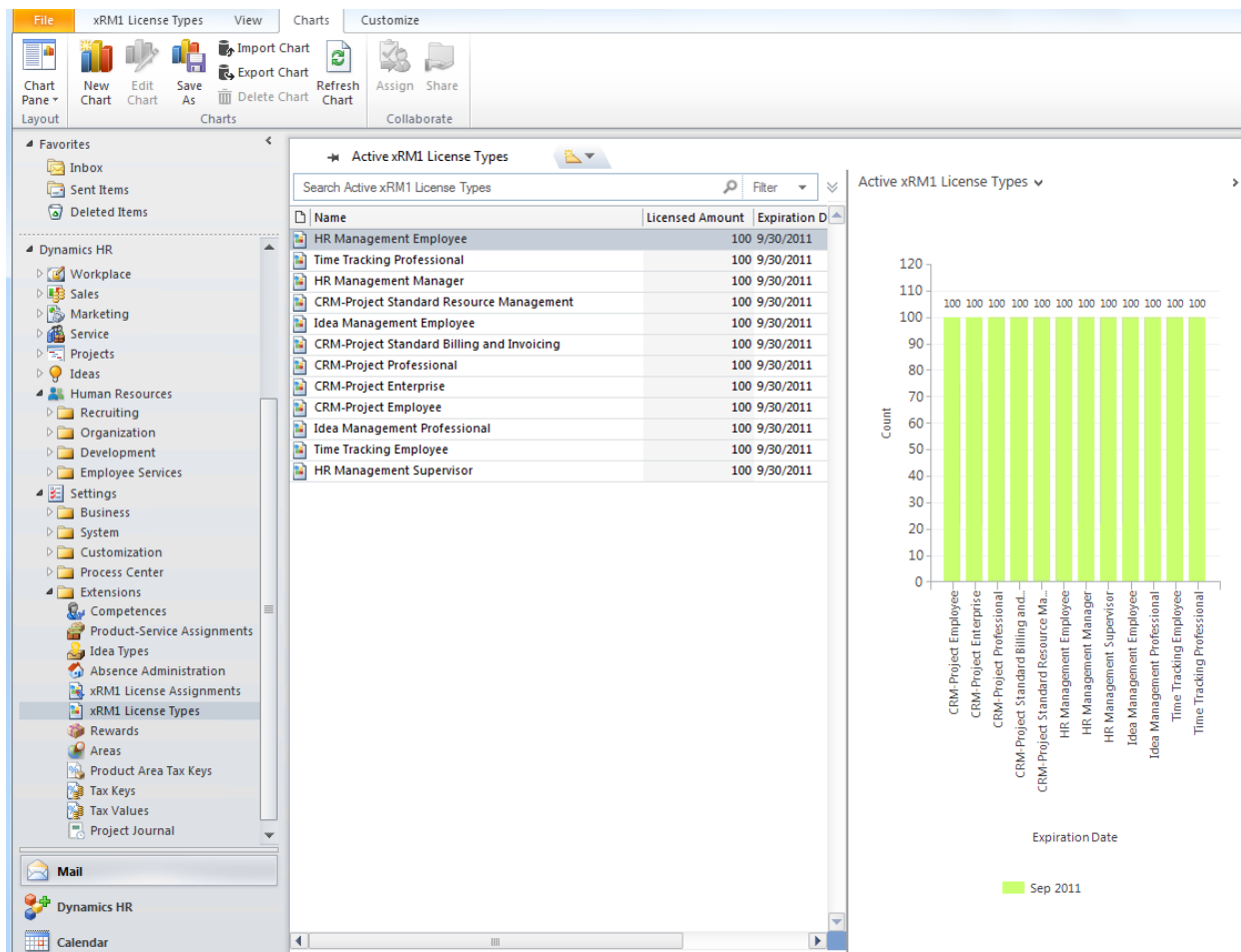
To be able to authorize leave and performance reviews, you need this security role. It's included in the license types **"xRM1 HR Supervisor"** and **"xRM1 HR Manager"**.

### 7.7.3 xRM1 HR Manager

This role is necessary for full functionality. It is only included in the license type **"xRM1 HR Manager"**.

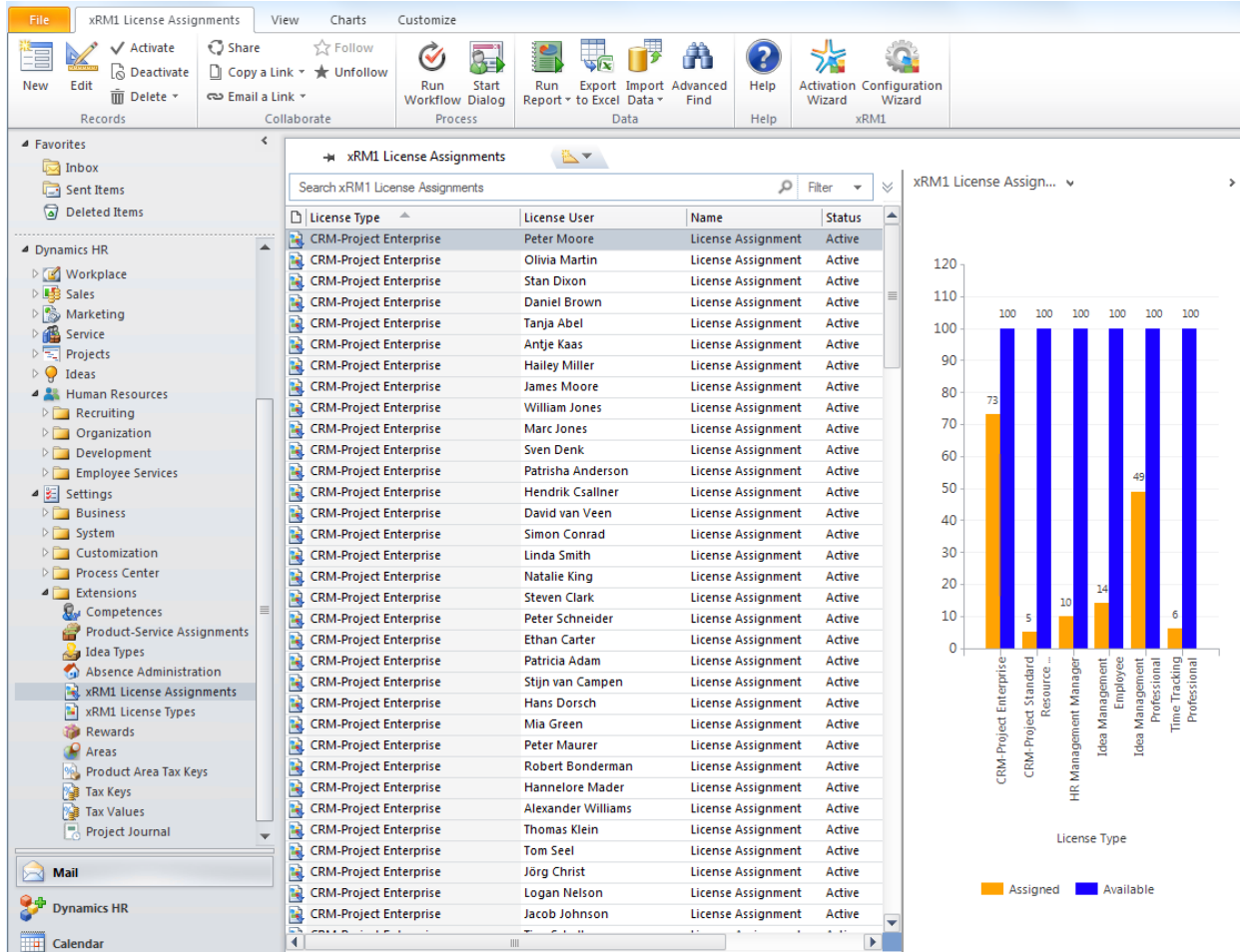
## 7.8 License types and license assignment

Under **"Settings"** → **"xRM1 License types"**, you will find an overview of the existing license types as well as their corresponding validity dates.





Under **"Settings"** → **"xRM1 License Assignments"**, you can find a list of the current license assignments.



In order to assign a license to a user, click on **"Settings"** → **"xRM1 License Assignments"** and then (in the ribbon bar) on **"New"**. In the open window, select the **"License User"** and **"License type"** which this user should have. For the option **"Assign Roles Automatically"**, we recommend keeping the setting on **"Yes"**, as the user receives all security roles of the assigned license automatically. After clicking **"Save & Close"**, the user with the applicable license appears in the list of license assignments.

The screenshot shows the 'License Assignment' form. At the top, there's a navigation bar with 'SETTINGS', 'xRM1 License Assign...', and 'License Assignment'. Below this is a toolbar with buttons for '+ NEW', 'DEACTIVATE', 'DELETE', 'SHARE', and 'EMAIL A LINK'. The main section is titled 'XRM1 LICENSE ASSIGNMENT : INFORMATION' and 'License Assignment'. Under the 'General' tab, there are two fields: 'License User' with the value 'Hailey Miller' and 'License Type' with the value 'HR Management Manager'. To the right of these fields is a checkbox for 'Assign Roles Automatically' which is checked, with the value 'Yes' displayed. At the bottom, there is a 'Status Reason' field with the value 'Active'.